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THE MBTA FY2009 BUDGET

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Massachusetts Bay Transportation Authority

Driven by Customer Service

Table of Contents

Chairman's Letter ii
General Manager's Message iii
MBTA Board of Directors iv

THE MBTA

MBTA 1
Mission Statement and Goals 2
Executive Summary 3
Statement of Revenue and Expenses Line Item Descriptions 11
FY 2005 to FY 2009 Statement of Revenue and Expenses 16
Organization Chart 17
System Maps 18

DEPARTMENTS

Office of the General Manager 21
General Manager 22
Intergovernmental Affairs 24
Public Affairs 25
Law 26
Office of Diversity and Civil Rights 29
Transit Police 33
Safety 36
System-Wide Accessibility 38

Deputy General Manager/ Chief Financial Officer 39
Budget 40
Information Technology 42
Materials Management 45
Compliance and Reporting 47
Treasurer/Controller 48

Deputy General Manager for Planning and Development 51
Environmental Management 52
Planning and Development 55
Real Estate/Facilities Management 56

Deputy General Manager for Systemwide Modernization 59
Systemwide Modernization 60

Chief Administrative Officer 65
Audit Services 66
Customer Support Services 67
Human Resources 69
Marketing Communications 72
Labor Relations 75
Occupational Health Services 78

- Workers' Compensation
- Medical Operations
- Employee Assistance Program

Chief Operating Officer 79
Chief Operating Officer-Administration 80
Bus Operations 82
Operations and Service Development 85

- Operations Analysis
- Private Carrier Services
- ParaTransit Services-THE RIDE
- Office for Transportation Access

Operations Support 94
Railroad Operations 96
Subway Operations 100
Systemwide Maintenance and Improvements 104

Assistant General Manager for Design and Construction 107
Design and Construction 108

Appendix 109
Statistical Profile 110

THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF TRANSPORTATION

EOT

DEVAL L. PATRICK
GOVERNOR

TIMOTHY P. MURRAY
LIEUTENANT GOVERNOR

BERNARD COHEN
SECRETARY

October 9, 2008

The Honorable David Cohen
Chairman, MBTA Advisory Board
177 Tremont Street
Boston, MA 02111

Dear Mayor Cohen:

I am pleased to submit to you the MBTA's budget for Fiscal Year 2009.

The past year has been an exciting time for the MBTA, highlighted by record ridership growth across all services. In the last fiscal year, the MBTA also officially opened the Greenbush commuter rail line, added new Blue Line cars to improve service and increase train length from four cars to six, and re-opened the Mattapan Trolley with refurbished cars. The Authority implemented Wi-Fi access on the Worcester Commuter Rail Line and on MBTA Commuter Boats, providing a more convenient and connected commute to customers. And the MBTA put into service new, more energy-efficient buses that contributed to an effort to improve overall bus service.

Increased ridership is an important and welcome trend for the MBTA, but one that is not without challenges. Much of the increased demand for public transportation stems from the high cost of fuel, which also significantly impact the MBTA's budget. As more and more commuters switch to public transportation, the Authority must work to maintain a high quality of service despite the pressures on its bottom line. Attracting new riders, and then keeping them, must be a top priority for the Authority in the coming year.

Additionally, the MBTA and all of the Commonwealth's transportation agencies face a significant financial challenge for the foreseeable future. The MBTA must focus on streamlining its operations and finding cost-savings without sacrificing the service levels upon which so many commuters rely.

Governor Patrick is committed to the continued improvement of public transportation in Greater Boston and throughout Massachusetts. I look forward to continuing to work with the Board of Directors, the MBTA Advisory Board, and General Manager Grabauskas as we work to meet the challenges of the future and provide superior service to all customers.

Sincerely,

Bernard Cohen
Secretary and Chairman

TEN PARK PLAZA, BOSTON, MA 02116-3969
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Massachusetts Bay Transportation Authority

Deval L. Patrick
Governor

Timothy P. Murray
Lt. Governor

Bernard Cohen
Secretary and MBTA Chairman

Daniel A. Grabauskas
General Manager

The Honorable David Cohen
Chair, MBTA Advisory Board
177 Tremont Street
Boston, MA 02111

Dear Mayor Cohen:

The Massachusetts Bay Transportation Authority is pleased to present its Fiscal Year 2009 budget. The Authority's primary focus in FY09 will be to continue efforts to improve customer service, increase customer enhancements and communication, and increase service reliability. Noting that the Authority faces one of the most fiscally challenging times in its history, it is more important than ever to continue to make these improvements in the most efficient manner possible.

Instituting improvements and reforms at the Authority remain a top priority. Because of the unprecedented fiscal issues facing the Authority, we remain committed to managing better and smarter. For example, while service has significantly increased over the last 15 years, the Authority has decreased headcount by 4.6% over the same period. Also, since 2005, overtime has been reduced by 34.5%. We also have been managing smarter. In one instance, we changed the way we manage our parking program. This reform will realize approximately $23.2 million annually, which is a net increase of $3.1M for this year alone.

Despite all of the efforts we have undertaken, the Authority enters FY09 with severe challenges. This budget requires restructuring debt and tapping into reserve funds in an amount of $19.3 million. While these actions result in a balanced budget, restructuring outstanding debt increases long term costs and does not address the structural deficit in future years. Although many cost-containment initiatives have been put in place, we continue to feel the cumulative effects of unrealized sales tax growth, volatile energy prices, growing healthcare costs, and debt service costs: the last item accounting for over 26% of our total operating expenses. In addition, the new labor agreements will require a supplemental budget at the conclusion of arbitration/negotiations.

Fiscal Year 2009 will be the most fiscally challenging year to date. Yet I am confident that our commitment to customer service, service reliability, and system accessibility will make the MBTA the best transit property in the nation in spite of these challenges.

Sincerely,

Daniel A. Grabauskas
General Manager

Driven by Customer Service

Massachusetts Bay Transportation Authority, Ten Park Plaza, Boston, MA 02116-3974

MBTA BOARD OF DIRECTORS

The MBTA board is composed of business, social and industry leaders throughout the Commonwealth.

Bernard Cohen
Secretary of Transportation and MBTA Board of Directors Chairman
Commonwealth of Massachusetts

As Secretary of Transportation, Bernard Cohen directs the Executive Office of Transportation (EOT) (EOTPW). The Secretary has direct oversight of the Massachusetts Highway Department, the Registry of Motor Vehicles, and the Massachusetts Aeronautics Commission, and serves as the Chair of the MBTA Board of Directors.

Immediately prior to being appointed Secretary, Mr. Cohen oversaw the Federal Transportation Administration's Lower Manhattan Recovery Office (LMRO) in New York City. In this capacity, he led a $4.55 billion program to rebuild and restore transportation facilities and infrastructure in the wake of the terrorist attacks of September 11, 2001. The program's responsibilities included the construction of the permanent PATH terminal and the rebuilding of the Fulton Street Transit Center and the South Ferry Terminal Station.

Secretary Cohen has more than twenty years of experience in the field of public transportation. He has held senior management positions at the Massachusetts Bay Transportation Authority, the New York Metropolitan Transportation Authority and the Southeastern Pennsylvania Transportation Authority. Before being appointed to lead the LMRO, he served as Deputy Managing Director of the Massachusetts Bay Commuter Railroad Co., overseeing service in the Boston area.

Secretary Cohen graduated from Union College in New York. He received a Master's Degree from the Columbia University Graduate School of Journalism, and has worked as a freelance reporter for both the *Boston Globe* and *Boston Herald*. Secretary Cohen has two daughters, Celia and Abigail.

Willie J. Davis

Willie J. Davis is the senior partner in the law firm of Davis, Robinson & White, and he concentrates in the area of criminal defense. He is also Chairman of the Committee for Public Counsel Services. Recently, he was voted Chairman of the Board of Trustees of Morehouse College.

Mr. Davis is a graduate of Morehouse College in Atlanta, Georgia, where he received his Bachelor of Arts degree in Political Science in 1956. He received his Juris Doctor degree from the New England School of Law in 1963.

Mr. Davis has served as Assistant Attorney General of the Commonwealth of Massachusetts, where he was assigned to the Criminal Bureau from 1964 to 1969. In 1969, he was appointed an Assistant United States Attorney for the District of Massachusetts. In 1971, he was appointed United States Magistrate Judge for the District of Massachusetts. He served in this position until 1976.

Since 1976, Mr. Davis has practiced law in the Commonwealth, handling, for the most part, criminal cases both at the trial and appellate levels.

Baron H. Martin

The Honorable Baron H. Martin (Ret.) is an Arbitrator for Commonwealth Mediation and formerly for the Commonwealth of Massachusetts Appeals Court.

Judge Martin began his career in 1952 at the Metropolitan Transit Authority (MTA), now known as the MBTA. He was appointed a Special Justice of the Roxbury District Court in 1972 by then-Governor Francis Sargent and became a full-time Justice of the Trial Court of the Commonwealth upon his retirement from the MTA in 1976 as First Assistant General Counsel. In 1987, Judge Martin was appointed First Justice of the Wareham District Court where he served until his retirement in 1996. He also served as the First Justice of the Appellate Division of the District Court Southern Division. During his tenure as a judge, he served as Adjunct Professor of Law at Southern New England Law School.

Judge Martin has received numerous awards and citations for his outstanding service to the people of Plymouth County and the Commonwealth of Massachusetts, including The Brass Gavel Award by the Plymouth Bar Association and a citation issued by the City of Boston for Outstanding Contributions to the Black Presence in Boston, and Honorary Doctorates for Outstanding Community Service from William Penn University, Saints College and Bridgewater State College. He has devoted over 55 years to the service of the people of the Commonwealth of Massachusetts.

Judge Martin attended Boston University, Howard University and Suffolk University Law School.

Joseph M. Trolla

Joseph M. Trolla is Chief Operating Officer for Ryan Development LLC. Ryan develops commercial/industrial properties in the Westford/Metro West area. Prior to Ryan he was Vice President of Construction with Fafard Real Estate Development, Inc., of Ashland.

Mr. Trolla began his career in the field as a Superintendent with Flatley Construction in 1971, overseeing major projects in Randolph, Framingham and Bridgewater. Before joining Fafard Real Estate Development in 1978, Mr. Trolla held positions with the Marlborough Planning/Community Development Department and Stanmar, Inc.

Over the years, Mr. Trolla has developed/constructed more than 2.5 million square feet of industrial property and one million square feet of commercial property, in addition to renovating historic school buildings into condominiums, and building approximately 3,500 condominium units and 1,500 single-family homes.

Mr. Trolla is a member of the Marlborough Citizens Scholarship Foundation and the Bolton Street Association.

Mr. Trolla graduated from Wentworth Institute, in Boston, Massachusetts.

Janice Loux

An activist and organizer from an early age, Janice Loux was elected President of Local 26 in April 1997, serving as the first female President in the union's 111-year history. Prior to her presidency, she served as Vice President and Benefits Officer of Local 26. She is currently the Treasurer of the Greater Boston Hotel Employees Local 26 Trust Funds.

Ms. Loux developed the Local 26 benefits package, which is one of the most progressive in the country. Ms. Loux directed the unions successful 18-month lobbying effort to amend the Taft-Hartley federal labor law. The amendment was signed into law on April 18, 1990, allowing unions to bargain for housing benefits.

In 2001, Ms. Loux was elected to the Executive Board of the Hotel Employees and Restaurant Employees International Union as Vice President.

Frank F. Chin

Frank F. Chin is currently the chairman of the Chinese Community of New England, Inc. He is also a member of the Empowerment Zone Board.

Mr. Chin was the Purchasing Agent for the City of Boston for over 22 years. He is from the Chinatown area and has been very involved in civic duties and events. Mr. Chin has served on numerous boards and commissions, such as Chinatown Main Street, Chinatown/South Cove Neighborhood Council, Urban Renewal Committee, the South Cove YMCA, the Chinatown Grievance Task Force, New England Aquarium Trustee, Overseers of the Museum of Fine Arts, and the Real Property Commission of the City of Boston.

Mr. Chin is a Veteran of the Korean Conflict.

Mr. Chin attended Merrimack College.

Grace S. Shepard

Grace S. Shepard has served her community and the region as a volunteer in several diverse roles. She has been active at the Metropolitan Area Planning Council for 30 years, serving on the Executive Committee, as President of the Council and presently as Treasurer.

Mrs. Shepard was an active volunteer at the Museum of Fine Arts from 1973 to 2006, serving as a Gallery Instructor, as President of the Gallery Instructor Associates and as an MFA Overseer. She has served on various boards in her community of Sherborn for over 30 years, including 9 as Selectman and 6 as a member of the Advisory (Finance) Committee.

Mrs. Shepard is married, with 3 sons and 6 grandchildren. She is a graduate of Vassar College and has a Masters degree from Harvard.

Darnell L. Williams

A well-respected community leader, Darnell Williams is President and CEO of the Urban League of Eastern Massachusetts, a nonprofit organization providing services and programs in education, career and personal development and employment for African-Americans and other residents of color. Mr. Williams is well-known to and often assists other culturally diverse organizations beyond African Americans. Prior to joining the Urban League, Mr. Williams was Manager of Management Recruitment and Development at Massachusetts General Hospital (MGH) as well as a Diversity Consultant in private practice.

Mr. Williams was President of the Springfield Branch of the National Association for the Advancement of Colored People (NAACP) and served as the President of the NAACP New England Area Conference from 1996 to 2001. He is the former Director for the United Way of Pioneer Valley. Mr. Williams served as trustee of Bunker Hill Community College and Beaver Country Day School. He is a former board member of the Boston Workforce Development Coalition. Mr. Williams is a current member of the Boston Study Group, Chief Executives' Club of Boston, and the MGH Multicultural Community Advisory Committee. He also serves as Trustee of the Dana Farber Cancer Institute, and the Federal Reserve Community Development Advisory Board. In February 2008, he was appointed by Governor Deval Patrick to the Board of Directors of the Massachusetts Bay Transportation Authority.

A highly respected advocate and requested speaker on issues of importance pertaining to the challenges faced by communities of color and low-income families, Mr. Williams was a contributing member of Boston's successful effort to win the 2004 Democratic National Convention. For his contributions within the Black community and the City of Boston, Mayor Thomas Menino presented him with the 2003 Community Service Award. Mr. Williams received the 2005 Paul Parks Veteran's Community Service Award. Mayor Thomas Menino appointed him as Chairman of the Roxbury Strategic Master Plan Oversight Committee (RSMPOC) in 2005. In 2007, Mr. Williams was inducted into the Human Resources Alliance for African Americans (HRAAA) Hall of Fame.

A Gary, Indiana native, Mr. Williams earned his Master's degree in Education from Boston University after completing his undergraduate degree at American International College in Springfield, MA.

Darnell Williams and his wife Colleen, reside in Roxbury with their daughter, Imani.

Ferdinand Alvaro

Ferdinand Alvaro is Partner-in-Charge of the Adorno & Yoss LLP Boston office and Co-Chair of the National Business Law Group. Mr. Alvaro has devoted most of his career to counseling businesses and to the execution of complex business and real estate transactions, both as an attorney and a businessman. Before joining Adorno & Yoss LLP, he was Vice President, Commercial and General Counsel of BOC Process Systems, $2 billion global division of the BOC Group. In that capacity, he led a legal, financial, and technical team that closed financing transactions, acquisitions, venture capital investments, strategic alliances, and joint ventures in the U.S., Latin America, Europe, Asia, and the Pacific Rim.

From 1997 to 1999, contemporaneously with his duties at BOC, Mr. Alvaro served as Chief Executive Officer of the Cantarell Nitrogen Company ("CNC"), a consortium of U.S., U.K., Mexican, German and Japanese companies organized to develop a $1 billion infrastructure project in Mexico. During his tenure with CNC, he opened, staffed and managed its first offices in Mexico and addressed a variety of regulatory, political and local community issues, the resolution of which permitted the successful launch of the project. He also led a multi-sponsor CNC team that completed one of the very few successful limited recourse financing transactions closed with respect to Latin American projects that year. Over the course of his career, Mr. Alvaro has served on the boards of directors of United States, Chilean, Columbian, Mexican and Venezuelan companies.

EXPERIENCE
Mergers and Acquisitions
Commercial Real Estate
Venture Capital and Corporate Finance
International Transactions

EDUCATION
J.D., Harvard Law School (1980)
B.B.A., Accounting and Finance, Pace University (1977)

INVOLVEMENT
Named as a Massachusetts "Super Lawyer" in *Boston Magazine* (2006 and 2007)
Member, Judicial Nominating Commission (appointed by Governor Romney in 2005; reappointed by Governor Patrick in 2006; served until 2007)
Member, Corporate Executive Council of WGBH (public television)
Member, Governing Council, Boston Bar Association (2003-2006)
Member, Boston, American and Hispanic National Bar Associations
Trustee, Boston Bar Foundation
Director, Initiative for a New Economy (economic program initiated by Mayor Menino)

The MBTA

- Mission Statement and Goals
- Executive Summary
- Statement of Revenue and Expenses Line Item Descriptions
- FY 2005 to FY 2009 Statement of Revenue and Expenses
- Organization Chart
- System Maps

Mission Statement and Goals

Mission Statement:

The MBTA is a dedicated world class transit system built upon customer service excellence, accessibility, reliability, state-of-the-art technology, and a diverse workforce that reflects our commitment to the communities we serve.

Plan Goals:

MBTA Service: To provide clean, safe, and reliable public transportation, accessible to everyone, and a clean and safe environment for employees.

MBTA Infrastructure: To modernize the system through an aggressive State of Good Repair program while investing in cost-effective expansion projects to increase our customer base.

MBTA Financial Condition: To provide affordable transit for the public toward reducing the burden to taxpayers through efficient operations, innovative fare policies, and the generation of non-fare revenues, while simultaneously supporting a balanced capital program of modernization and expansion through strong project and grant management.

MBTA Employee Development: To recruit, train, and retain a highly professional, diverse, and committed workforce capable of improving the system in an efficient and cost-effective manner.

MBTA Communication: To develop direct, effective communication techniques that inform our customers, obtain valuable feedback, and develop goodwill for the organization.

Daniel A. Grabauskas
General Manager

Massachusetts Bay Transportation Authority
Driven by Customer Service

Executive Summary

The FY 2009 budget reflects a severe and continued deterioration in the Authority's financial stability. Since "forward funding" took effect on July 1, 2000, the Authority has experienced a cumulative underperformance of sales tax—its primary revenue source—and now faces an upcoming fiscal year in which total revenues are projected to increase by only $22.9 million (1.6%) and operating expenses by $49.5 million (4.8%). The structural budget deficit caused by continued rapid growth in expenses beyond the Authority's control and lagging revenue forces the Authority to resort to debt restructuring and the use of reserve funds to balance the budget.

At the end of the Authority's budget process this year and after accounting for non-controllable cost increases in ongoing operations as well as contractual and statutory obligations, the Authority was faced with a $75 million deficit. Several options were available to the Authority to address the structural deficit in FY 2009. Fares could have been increased[1] and/or service levels reduced. Both of these options were deemed to be unacceptable. Therefore, the Authority has elected to restructure its outstanding debt and use a significant portion of its "rainy day" funds, and these assumptions have been included in the proposed FY 2009 budget. While this will result in a balanced budget for 2009, restructuring outstanding debt increases long-term costs and does not address the structural deficit in future years. New sources of revenue are required to preserve quality transportation at an affordable price.

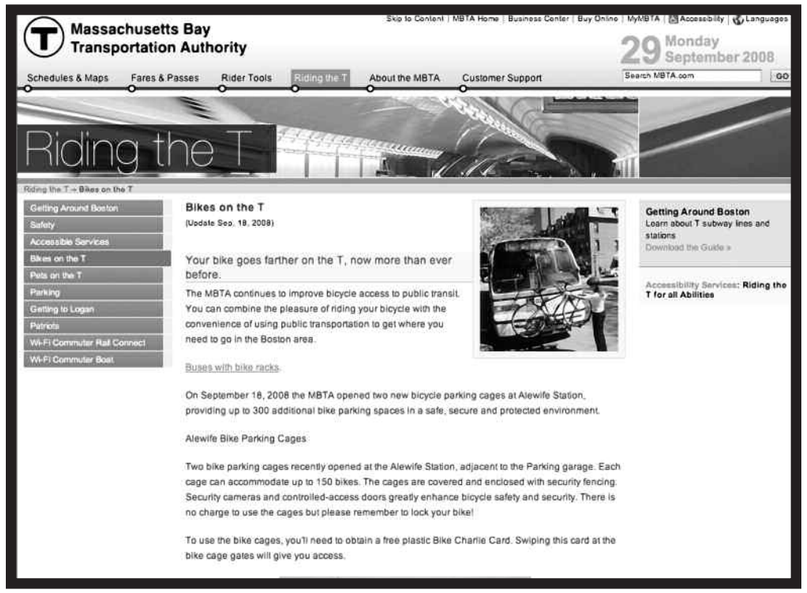
The following table illustrates the Authority's strategy to produce a balanced budget in FY 2009:

Authority's Structural Deficit in FY 2009 ($ Millions)	
FY 2009 Beginning Deficit	**($74.3)**
Debt Service Structuring	
Advance synthetic fixed rate refunding—structure savings all in FY 2009	11.6
Debt restructuring—defer payment of principal	28.4
Short-term financing of the Capital Program	5.0
Current refunding of principal due in 2009	10.0
Reserve Fund Draws	
Deficiency Fund	15.0
Capital Maintenance Fund	4.3
FY 2009 Ending Deficit	**($0.0)**

[1] The last fare increase was in January 2007.

The planned debt service restructuring in FY 2009 cannot be replicated indefinitely and while the sale of high value surplus properties and leveraged lease transactions[2] can provide a one-time revenue source, the Authority's remaining modest reserves are not enough to compensate for future deficits as long as sales tax revenue underperforms expectations. The use of $15 million out of the Deficiency Fund will deplete this reserve account and the use of $4.3 million from the Capital Maintenance Fund[3] represents the first draw for operating budget purposes. This draw, as well as any future draws on the Capital Maintenance Fund to balance the operating budget, will compromise desperately needed funds for state of good repair projects.

The Authority faces an increase in operating expenses of $49.5 million (4.8%). The FY 2009 budget request funds little more than increases to the Commuter Rail fixed price service contract, paratransit, energy, and healthcare costs. The Purchased Commuter Rail Service line item is increasing by $24.6 million due largely to train fuel prices, increases in the contract price with Massachusetts Bay Commuter Railroad, right-of-way maintenance work, and a full year of Greenbush service. The Materials, Services, and Supplies line item is increasing by $19.1 million due mainly to escalating fuel and energy costs, station cleaning contracts, maintenance-of-way and telecommunications initiatives, and system-wide accessibility initiatives. Healthcare costs are increasing by $4.7 million. Contractual cost increases in THE RIDE and Private Carrier Bus require an additional $4.0 million. Lastly, the Financial Services line item is increasing by $2.6 million to pay for credit and debit card fees as the Authority continues to experience a higher usage of this payment option by our customers.


Skip to Content | MBTA Home | Business Center | Buy Online | MyMBTA | Accessibility | Languages
Massachusetts Bay Transportation Authority
29 Monday September 2008
Schedules & Maps
Fares & Passes
Rider Tools
Riding the T
About the MBTA
Customer Support
Search MBTA.com
GO
Riding the T
Riding the T → Bikes on the T
Getting Around Boston
Safety
Accessible Services
Bikes on the T
Pets on the T
Parking
Getting to Logan
Patriots
Wi-Fi Commuter Rail Connect
Wi-Fi Commuter Boat
Bikes on the T
(Update Sep. 18, 2008)
Your bike goes farther on the T, now more than ever before.
The MBTA continues to improve bicycle access to public transit. You can combine the pleasure of riding your bicycle with the convenience of using public transportation to get where you need to go in the Boston area.
Buses with bike racks.
On September 18, 2008 the MBTA opened two new bicycle parking cages at Alewife Station, providing up to 300 additional bike parking spaces in a safe, secure and protected environment.
Alewife Bike Parking Cages
Two bike parking cages recently opened at the Alewife Station, adjacent to the Parking garage. Each cage can accommodate up to 150 bikes. The cages are covered and enclosed with security fencing. Security cameras and controlled-access doors greatly enhance bicycle safety and security. There is no charge to use the cages but please remember to lock your bike!
To use the bike cages, you'll need to obtain a free plastic Bike Charlie Card. Swiping this card at the bike cage gates will give you access.
Getting Around Boston
Learn about T subway lines and stations.
Download the Guide »
Accessibility Services: Riding the T for all Abilities

[2] Legislation now prohibits these transactions.
[3] The Capital Maintenance Fund currently has $40.2 million.

Offsetting the above cost increases are $5.5 million in savings in other lines items: wages, pensions, social security, unemployment, and casualty and liability insurance. In total and including the debt restructuring, the Authority's requested expense budget exceeds available revenues by $19.3 million thus requiring the use of $15 million from the Deficiency Fund and $4.3 million from the Capital Maintenance Fund.

In addition and pursuant to Section 11 of Chapter 161A of Massachusetts General Laws and the reporting requirements contained therein, the Authority has established, in conjunction with the preparation of this operating budget request, a target net operating investment per passenger mile ratio that it expects to achieve in FY 2009: 30.9 cents. The legislation stipulates that beginning in FY 2006, the Authority shall seek to achieve and maintain a target ratio of not more than 20 cents for any fiscal year. This target is again not achievable in FY 2009 given modest revenue growth and significant cost escalation in operating expenses. This is a target and not legislatively mandated.

As with fiscal years before it, FY 2009 will be a difficult and challenging year. The Authority is currently in interest arbitration for labor agreements that expired in FY 2006 and does not know what impact, if any, an arbitration award would have on the FY 2009 budget—whether for a wage increase in FY 2009 only or wage increases retroactively for prior fiscal years.[4] Healthcare cost reform is also before the arbitrator while fuel and energy prices continue to be volatile. The resources requested in this budget are the minimum necessary to maintain good customer service, improved service reliability, and enhanced system accessibility.

While the Authority will continue to explore ways of maximizing revenue and containing operating expenses in order to minimize the need to draw upon the Deficiency and Capital Maintenance Funds, the probability of the Authority solving its structural deficit in FY 2009 and beyond will be difficult, if not impossible, without additional revenue sources or debt relief.

FY 2009 Revenue

Total revenue from all sources is projected to increase by $22.9 million (1.6%) to $1.435 billion. The major categories follow:

Operating Revenue

Total Operating Revenue is projected to increase by $13.4 million[5] (2.8%) to $491.9 million[6] in FY 2009. The increase is due to $7.4 million in additional fare revenue, $2.5 million in additional advertising revenues, and $3.5 million in additional revenue from real estate operations. The Authority's projected fare revenue budget of $437.5 million creates a fare recovery ratio of 40.2%–just slightly under the FY 2008 fare recovery ratio of 41.4%.

[4] It is important to note that the FY 2009 budget request has no funding for arbitrated wage increases.
[5] $4.5 million in rapid transit revenue, $1.4 million in commuter rail revenue, $1.3 million in surface transit revenue, and $0.2 million in school, seniors and paratransit revenue
[6] The two largest components of the increase are $1.5 million in parking revenue from parking lots and garages and $1.5 million from Transit Reality Associates' real estate activities on behalf of the Authority. The balance is composed of other assorted smaller sources.

Non-Operating Revenue
Non-operating Revenue will decrease by $5.1 million to $30.3 million. The Authority anticipates lower property sales in FY 2009 ($9.3 million vs. $10.2 million in the FY 2008 budget) and fewer projected new non-operating income initiatives ($6.0 million vs. $10.6 million in the FY 2008 budget). This $5.5 million decrease in non-operating income will be partially offset by a $200,000 increase in interest income and a $251,000 increase in utility reimbursements.

Revenue from Dedicated Sources
Revenue from Dedicated Sources is projected to increase by $14.6 million (1.6%) to $913.5 million in FY 2009. Consistent with the "forward funding" legislation, assessments (Funds from Local Government) will increase by $3.6 million (2.5%) to $146.5 million. Revenue Receipts from Sales Tax will increase by $11.0 million (1.5%) to $767.0 million.

At the onset of "forward funding," the estimate[7] of sales tax for FY 2009 was $817 million and was predicated on a growth assumption of a minimum of 3% per year. In fact. sales tax has increased an average of only 1.6% per year through FY 2008—leaving a gap in expected funding of $49 million in FY 2009 and a cumulative gap in funding of $199 million since FY 2001.

FY 2009 Operating Expenses

The need for additional resources in FY 2009 falls into two categories: (1) ongoing operations and quality of service, and (2) contractual and statutory obligations. The Authority has generated savings related to ongoing operations, which have helped minimize the overall operating expense increase.

Ongoing Operations and Quality of Service
The Authority will require $36.9 million in additional funds in FY 2009 for the following, largely non-controllable, costs:

- $8.8 million for increased train fuel costs for Commuter Rail
- $8.3 million for power and utilities
- $3.3 million for increased fuel costs for diesel, compressed natural gas, gasoline, and jet fuel primarily for Bus Operations
- $3.8 million for Commuter Rail for right-of-way maintenance work
- $2.6 million for financial service charges (credit/debit card fees for Charlie fare media purchases)[8]
- $2.2 million for security and safety telecommunications maintenance and repair for closed circuit television (CCTV) ($1.0 million), the wide area network (WAN) ($0.4 million), fire alarms ($0.6 million), and radios ($0.2 million)
- $1.7 million for maintenance-of-way initiatives under the track realignment program which includes rail grinding ($1.0 million), optical rail testing ($0.5 million), and track geometry testing ($0.2 million) to improve service reliability and service quality
- $1.4 million for miscellaneous Commuter Rail expenses including contract scope changes ($0.5 million), penalties ($0.5 million), and amortization of mobilization costs ($0.4 million)
- $1.1 million for Seimens warranty contract for public address video messaging system (PAVMS) on buses and maintenance of hand scanners
- $1.0 million for contract cleaning of stations, vehicles, and facilities
- $1.0 million for Commuter Rail right-of-way improvement projects required under the Attleboro Line Agreement
- $0.7 million for system-wide accessibility initiatives including wayfinding directional signage and updating the Design Guide for Access (both Boston Center for Independent Living commitments)
- $0.5 million for expenses related to the corporate pass program and automated fare collection intellectual property legal support
- $0.5 million for IT standard hardware and software maintenance agreements

Contractual and Statutory Obligations
The Authority will require $18.1 million in additional funds in FY 2009 as a result of higher healthcare costs and existing contractual and statutory obligations as follows:

- $6.5 million for the contractual fixed price contract increase with Massachusetts Bay Commuter Railroad
- $4.7 million for increased healthcare expenses—a 4.3% increase over the FY 2008 budget
- $4.0 million to fund contract rate increases, fuel costs and higher ridership in Purchased Local Service Subsidy programs: THE RIDE ($3.9 million), Commuter Boat and Private Carrier Bus services ($0.1 million)
- $2.9 million for a full year of Greenbush Commuter Rail service

Cost Reductions
Offsetting the requested budget increases associated with ongoing operations and quality of service and contractual and statutory obligations are cost reductions which total $5.5 million:

- $3.9 million in pension savings due to a reduction in the Authority's contribution rate to the MBTA Retirement Fund
- $0.8 million in wage cost reductions due to the elimination of non-service related positions
- $0.5 million in risk insurance (excess liability insurance) costs
- $0.2 million in lower unemployment utilization
- $0.1 million in social security due to a reduction in overall wage costs

[7] Finance Plan Base Revenue Amount (BRA)
[8] Although credit/debit card fees were not budgeted as an expense in FY 2008, the Authority has elected to record these as an expense in FY 2009. In prior years, the charges were applied as a reduction to revenue.

FY 2009 Debt Service

Currently, no dedicated funding source exists to pay for the Authority's portion of the Capital Investment Program. Historically, the MBTA has issued debt in order to fund this major portion of costs associated with its capital projects. The Authority's five-year Capital Investment Program is funded by five sources: revenue bonds, pay-as-you-go capital, federal grants, state infrastructure funds, and grant anticipation notes. In FY 2009, as in past years, the MBTA's non-federal portion of the capital program will be funded primarily by the issuance of new revenue bonds.

Since the implementation of "forward funding" in FY 2001, the Authority has issued three series of assessment bonds ($1.3 billion), four series of sales tax bonds ($894 million), and one series of grant anticipation notes ($82 million) to fund the Authority's share of the Capital Investment Program. Debt issued since "forward funding" along with debt that was issued prior to FY 2001 now totals $5.0 billion. Debt service costs consume 26% of the Authority's FY 2009 operating revenues.

Since FY 2001, the MBTA has attempted to implement a "pay-as-you-go" capital funding structure, but that has been difficult with the limited growth in sales tax revenues. The Authority continues to rely on the issuance of revenue bonds to fund its share of the Capital Investment Program. The Authority has implemented a number of debt reduction strategies in order to reduce debt service costs in FY 2009. These initiatives include an advance synthetic fixed rate refunding ($11.6 million) and a debt restructuring ($28.4 million). The Authority will also delay the issuance of new money by using commercial paper to fund capital projects, which is projected to save $5.0 million. A current refunding is also planned for FY 2009 that will reduce debt service costs by up to $10.0 million in FY 2009, but will increase debt service costs overall in the long-term. These four debt management initiatives reduced the FY 2009 debt service costs by $55.0 million from $422.8 million to $367.8 million, but will increase costs in future years.

In FY 2009, the Authority will fund capital projects by utilizing its $250 million Commercial Paper Program and then retire the notes with the issuance of a series of revenue bonds later in FY 2009. This strategy allows the MBTA to finance capital projects by borrowing funds in a short-term interest rate environment and achieve a lower cost of capital. In addition to the debt service expenses resulting from the issuance of revenue bonds, the Authority also pays debt on:

- General Transportation System (GTS) bonds, secured by the Commonwealth Guarantee (Legacy Debt)
- Short-Term Notes (Commercial Paper Program), used to provide intermediate capital funds

Total principal and interest expenses are projected to decrease by $7.2 million (2.0%) in FY 2009. Principal payments are projected to decrease by $23.6 million (18.7%) due to the planned debt restructuring. Interest costs are projected to increase by $16.4 million (7.2%) in FY 2009, which is due to a new bond issue to fund capital projects, the use of commercial paper, and a significant reduction in the amount of income received from prior derivative transactions that provide a direct offset to interest expense.

The following table summarizes the FY 2009 principal payments and interest expense:

Bond Issue	Principal Payment	Interest Expense
Prior Obligations	$110.9 million	$70.0 million
Revenue Bonds	46.7 million	166.1 million
New Revenue Bonds		6.4 million
Commercial Paper		4.2 million
Derivative Income		(1.0) million
Advance Synthetic Refunding	(11.6) million	
Debt Restructuring	(28.4) million	
Delay in New Money Bond Issue	(5.0) million	
Current Refunding in Fiscal 2009	(10.0) million	
Total	**$102.6 million**	**$245.7 million**

Lease Payments
Lease payments will increase by $0.7 million to $19.5 million. This is a result of arranging additional tax-exempt vehicle leases for THE RIDE program, the MBTA Police Department and the Systemwide Maintenance Improvements Department.

Debt Management
The MBTA refunded over $2.0 billion in debt during FY 2005, FY 2006 and FY 2007 in order to achieve economic savings and reduce debt service costs. Debt management also includes defeasance of debt and hedge agreements in order to manage financing costs and volatility in an uncertain economic environment. The Authority will continue to actively manage its debt portfolio with the objective of minimizing its cost of capital and providing sufficient funds for the capital program during these difficult economic times.

Perhaps the greatest challenge facing the Authority is the expected rise in debt service costs (principal and interest) over the next several years. With the continuing slow growth in sales tax revenue, debt service costs will consume an ever increasing amount of revenue each year. Unless corrected or mitigated, this will compromise the Authority's ability to continue to provide the anticipated service levels included in the FY 2009 budget in future years. The Authority could decide to curtail the Capital Investment Program. However, since the majority of the debt has been issued this would provide very little relief in the short term. In addition, disinvestment in the system's infrastructure and modernization would result in a deterioration of service reliability, non-compliance with legal commitments, slower progress in making the system more accessible and maybe most importantly, loss of ridership. The Authority therefore has made a commitment to spend a minimum of $470 million annually and to allocate at least 90% of the Capital Investment Program toward State of Good Repair projects.

SUMMARY

The FY 2009 budget request of $1.455 billion reflects a 3% overall increase over the FY 2008 budget and was achieved, in addition to debt restructuring, by reductions to a number of departments' budgets and transfer of resources among departments. The savings and reallocations have allowed the Authority to focus scarce resources on maintaining assets including the fleet and rights-of-way, paying for contractual cost increases for Commuter Rail and THE RIDE, and maintaining core service levels.

Despite having a number of departments and line items level funded or reduced from their FY 2008 budget levels, the ongoing transportation and maintenance costs including fuel and energy, the contractual obligations of collective bargaining agreements with Authority employees and retirees, and the contracts with providers of purchased transportation services, require tapping into reserve funds to avoid service reductions.

Statement of Revenue and Expenses

OPERATING REVENUES

Operating revenues consist of fare revenue, advertising revenue, and revenue from real estate transit operations.

The MBTA receives fare revenue from several sources: the rapid transit or subway system; the commuter rail system; the surface transit system, which includes all local and express buses; and from schools, seniors, and the paratransit system known as THE RIDE.

Advertising revenue is generated from all advertising in MBTA stations and vehicles.

Revenue from real estate transit operations covers income earned by the Authority from a variety of non-fare sources including parking, tenant, and other project-related revenue.

Non-Operating Revenues

Non-operating revenues include interest income, non-operating income, funds from the federal government, and utility reimbursements.

Interest income is generated from the investment of MBTA operating cash on hand, which is derived from fare revenue, state sales tax receipts, and assessments on the cities and towns in the MBTA service district.

Non-operating income is derived from miscellaneous non-transportation sources such as property sales, safety training, service fees, vendor discounts, and insurance claims.

Funds from the federal government are received as reimbursement for programs and services provided through the operating budget. Such programs include, but are not limited to, Job Access Reverse Commute, Preventative Maintenance, and Transit Security Grant Programs.

Utility reimbursements are income resulting from the sale of electricity to vendors who lease space on MBTA property.

Revenue from Dedicated Sources

Revenue from dedicated sources is composed of funds from local governments, which consist of assessments on the 175 cities and towns in the MBTA service district, and revenue receipts from state sources, which reflect 20% of state sales tax receipts.

OPERATING EXPENSES

Wages
Wages are paid to approximately 6,100 employees of the Authority who provide transportation services or perform support functions.

Over 95% of the Authority's employees belong to one of the 29 unions. Because most of the Authority's workforce is unionized, most elements of compensation and working conditions are collectively bargained. Nonetheless, management initiatives to improve flexibility in personnel deployment have allowed the increasingly cost-effective use of every wage dollar.

FRINGE BENEFITS

The MBTA provides a number of fringe benefits to its employees. They are reflected in this line item and are described below.

MBTA Pensions
The MBTA offers three independent pension plans for its employees, each of which is funded by employee payroll deductions that are matched by contributions made by the Authority. The largest of these plans is the MBTA Retirement Fund, to which the majority of employees belong.

The two other pension plans are the MBTA Police Retirement Fund, available only to police officers, and the Deferred Compensation Savings Plan for eligible executive and unaffiliated employees.

Health Care Insurance
The MBTA's health care benefits package for employees and retirees includes five healthcare plan choices: Blue Cross/Blue Shield's Blue Care Elect Preferred Plan (PPO), Blue Cross/Blue Shield's Blue Choice Point of Service Plan (POS), Harvard/Pilgrim Health Plan, Blue Cross/Blue Shield's Network Blue, and Tufts Associated Health Plan. Most active unionized employees contribute a 15% co-insurance premium. The executive employee co-insurance premiums are two-tiered: those hired before July 1, 2003 contribute a 20% co-insurance premium, while those hired after July 1, 2003 contribute 25%. Full healthcare benefits are provided at no cost to MBTA retirees. The Authority provides dental benefits through the Delta Dental Plan. Eligible employees who elect to participate contribute a 43% premium.

Group Life Insurance
The Authority currently provides basic life insurance coverage for all active employees, ranging from $6,000 to two-and-one-half times an employee's salary, depending on employment status and union affiliation. For some affiliations, supplemental life insurance is also available. Group life insurance is continued at reduced coverage levels upon retirement.

Disability Insurance
The MBTA has several policies that cover employees in the event of accidents or sickness. Accidental death and dismemberment pays benefits if an employee dies or suffers certain severe injuries as a result of an accident whether on or off the job. In addition, the MBTA has a group long-term disability program for executive employees, which provides up to 40% of salary continuation in the event of a long-term disability. The policy provides an option for executive employees to purchase 20% additional coverage.

Workers' Compensation
Any employee who is injured on the job or suffers from an illness that is job-related is eligible to apply for and receive Workers' Compensation from the MBTA.

Other Fringe Benefits
The MBTA also provides child care and tuition reimbursement.

PAYROLL TAXES

FICA
The cost of the Authority's Social Security tax contribution on behalf of all MBTA employees is reflected here.

The MBTA's contribution to the Federal Social Security System is calculated using an effective rate of 6.2% for Old Age and Disability Insurance (OADSI) and 1.45% for Hospital Insurance, for a combined rate of 7.65%.

Unemployment Insurance
The MBTA, as a self-insurer, is responsible for paying all unemployment compensation provided to employees in accordance with state and federal regulations.

MATERIALS, SUPPLIES AND SERVICES

This line item includes funding for purchases necessary for the provision of safe, reliable and efficient transportation services. The principal components of this line are materials, fuel, traction and non-traction power, utilities, and uniforms. Rental costs, contract cleaning, and postage are additional operating expenses found in this line item.

CASUALTY AND LIABILITY

This line item funds the cost of litigation related judgments and settlements resulting from personal injury and property damage claims against the MBTA, as well as related claims resolved before litigation. Also included are the costs of premiums for property and casualty insurance coverage and bonding the officials.

PURCHASED COMMUTER RAIL EXPENSES

This line item represents the subsidy figure for the operation of Commuter Rail service through a contract with a third party. The contractor, Massachusetts Bay Commuter Railroad Company, began operating and maintaining MBTA-owned rolling stock and Rights-of-Way on July 1, 2003. Railroad Operations manages this contractual relationship through four divisions: Transportation, Mechanical, Engineering, and Finance & Administration.

PURCHASED LOCAL SERVICE EXPENSES

The MBTA currently subsidizes four separate programs in which private contractors deliver important public transportation services—THE RIDE, Commuter Boat, Private Carrier Bus, and Suburban Bus.

FINANCIAL SERVICE CHARGES

Financial service charges include various fees paid to financial institutions and brokerage firms. The majority of these charges are for refunding initiatives, prospectus preparation, and other legal and fiscal services.

TOTAL OPERATING EXPENSES

The total of all operating expenses, including the direct and indirect costs of providing transportation services, is summarized in this line item. Total operating expenses for FY 2009 are projected at $1,087.0 billion.

DEBT SERVICE EXPENSES

Debt Service costs are a combination of three components: principal and interest costs on debt as well as payments on operating leases for rolling stock equipment. The MBTA issues debt based on the Authority's Capital Investment Program. Spending projections on the MBTA's capital projects determine the amount and date of debt issuance required to support the capital program.

The MBTA receives 20% of the Commonwealth's sales tax collections as well as assessments from 175 communities in the Commonwealth. The Authority issues both sales tax bonds and assessment bonds. Sales tax bonds are secured by dedicated sales tax receipts from the Commonwealth, while assessment bonds are supported by assessments from the communities.

The Sales Tax Trust Agreement requires certification by April 1st of each year that the Authority has provided for payment of its General Obligation bonds in its upcoming fiscal year budget. If the MBTA is unable to make this certification, the Authority is required to deposit sufficient funds from the dedicated sales tax to pay prior obligations.

The MBTA continues to explore and monitor a variety of financing options and market conditions with the goal of minimizing debt costs while completing all the projects in its capital plan.

Net Revenue/(Expense) is the net of Total Revenues and Total Expenses.

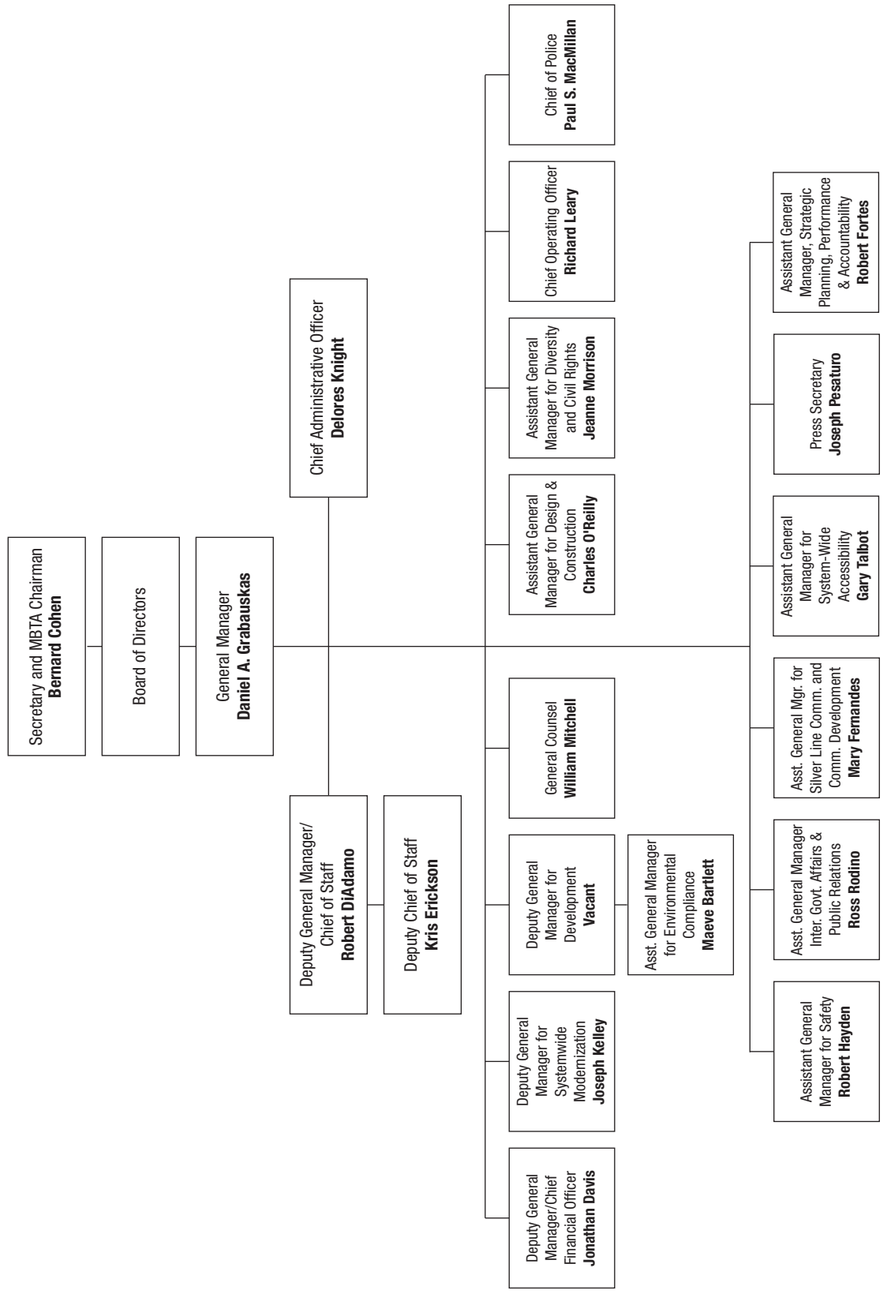
The Deficiency Fund and the Capital Maintenance Fund are both funded by the operating budget net revenue and are held by the Authority.

The Deficiency Fund may be used to pay debt service on bonds, notes and other obligations and expenses of the Authority. The Capital Maintenance Fund may be used to pay a portion of the ongoing schedule of maintaining the equipment and mass transportation facilities of the Authority.

FY 2005 to FY 2009 Statement of Revenue and Expenses

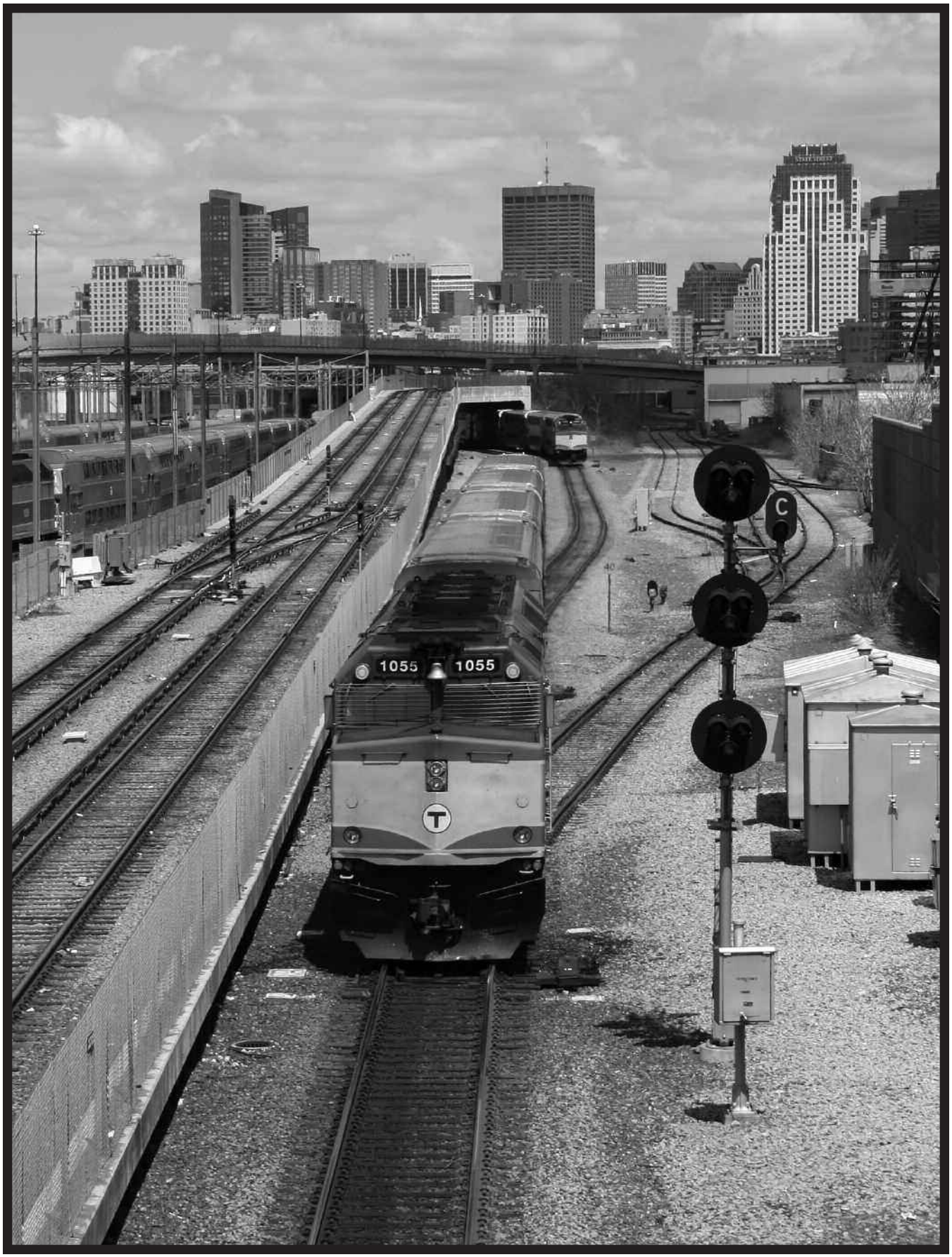
REVENUE	FY2005	FY2006	FY2007	FY2008	Budget FY2009
Operating Revenues					
Rapid Transit Revenue	136,256,396	148,388,899	180,413,594	200,815,792	205,237,445
Commuter Rail Transit Revenue	98,790,037	104,137,787	123,020,901	140,617,665	138,625,103
Surface Transit Revenue	80,080,979	75,700,371	76,117,496	92,983,968	85,837,950
School, Senior and Paratransit Revenue	4,143,754	4,868,914	6,935,962	6,544,538	7,782,656
Advertising and Concession Revenue	21,610,945	9,727,091	11,954,182	12,981,157	13,500,000
Revenue from Real Estate Operations	26,140,563	37,486,904	33,179,436	35,854,282	40,904,119
Total Operating Revenues:	**367,022,674**	**380,309,966**	**431,621,571**	**489,797,401**	**491,887,273**
Non-Operating Revenues					
Interest Income	4,361,467	3,447,601	4,843,353	6,667,974	4,000,000
Non-Operating Income	4,194,911	23,076,729	18,836,131	2,060,329	15,262,344
Funds from Federal Government	6,614,493	10,884,751	8,035,587	8,025,720	8,000,000
Utility Reimbursements	1,534,660	2,206,452	2,451,926	2,307,054	3,051,000
Total Non-Operating Revenues:	**16,705,530**	**39,615,533**	**34,166,997**	**19,061,078**	**30,313,344**
Revenue from Dedicated Sources					
Funds from Local Governments	137,732,280	136,026,829	139,427,540	142,913,229	146,486,059
Revenue Receipts from State Sources	704,620,528	711,086,005	733,963,311	755,982,210	767,019,551
Total Dedicated Revenues:	**842,352,808**	**847,112,834**	**873,390,851**	**898,895,439**	**913,505,610**
Total Revenues:	**1,226,081,013**	**1,267,038,333**	**1,339,179,419**	**1,407,753,918**	**1,435,706,227**
EXPENSES					
Operating Expenses					
Wages	337,189,978	347,845,647	353,664,245	361,508,443	357,722,598
Fringe Benefits	125,336,543	146,386,155	158,339,840	160,040,570	170,528,392
Payroll Taxes	26,900,012	27,455,974	27,479,403	27,336,436	28,270,593
Materials, Supplies and Services	121,716,973	134,304,402	145,355,389	162,826,552	182,943,232
Casualty & Liability	14,672,240	14,191,661	15,605,917	16,231,200	15,735,693
Purchased Commuter Rail Expenses	216,403,861	216,249,789	223,729,831	247,434,243	266,176,063
Purchased Local Service Expenses	43,985,446	49,520,600	54,572,067	60,614,115	61,531,256
Financial Service Charges	1,801,021	1,623,857	1,728,409	1,728,946	4,328,960
Total Operating Expenses:	**888,006,076**	**937,578,085**	**980,475,100**	**1,037,720,505**	**1,087,236,787**
Debt Service Expenses					
Interest	223,291,802	205,292,656	229,571,436	234,235,624	245,716,876
Principal Payments	95,651,923	113,104,925	112,722,401	116,476,024	102,567,312
Lease Payments	17,577,942	18,270,012	21,110,882	18,621,977	19,500,000
Total Debt Service Expenses:	**336,521,667**	**336,667,593**	**363,404,719**	**369,333,625**	**367,784,188**
Total Expenses:	**1,224,527,743**	**1,274,245,678**	**1,343,879,819**	**1,407,054,129**	**1,455,020,975**
Surplus/(Deficit)	**1,553,270**	**(7,207,345)**	**(4,700,400)**	**699,789**	**(19,314,748)**
Deficiency Fund	**(1,553,270)**	**7,207,345**	**4,700,400**	**0**	**15,000,000**
Capital Maintenance Fund					**4,314,748**
Net Surplus/(Deficit)	**0**	**0**	**0**	**699,789**	**0**

Organization Chart



Rapid Transit Map

Commuter Rail Map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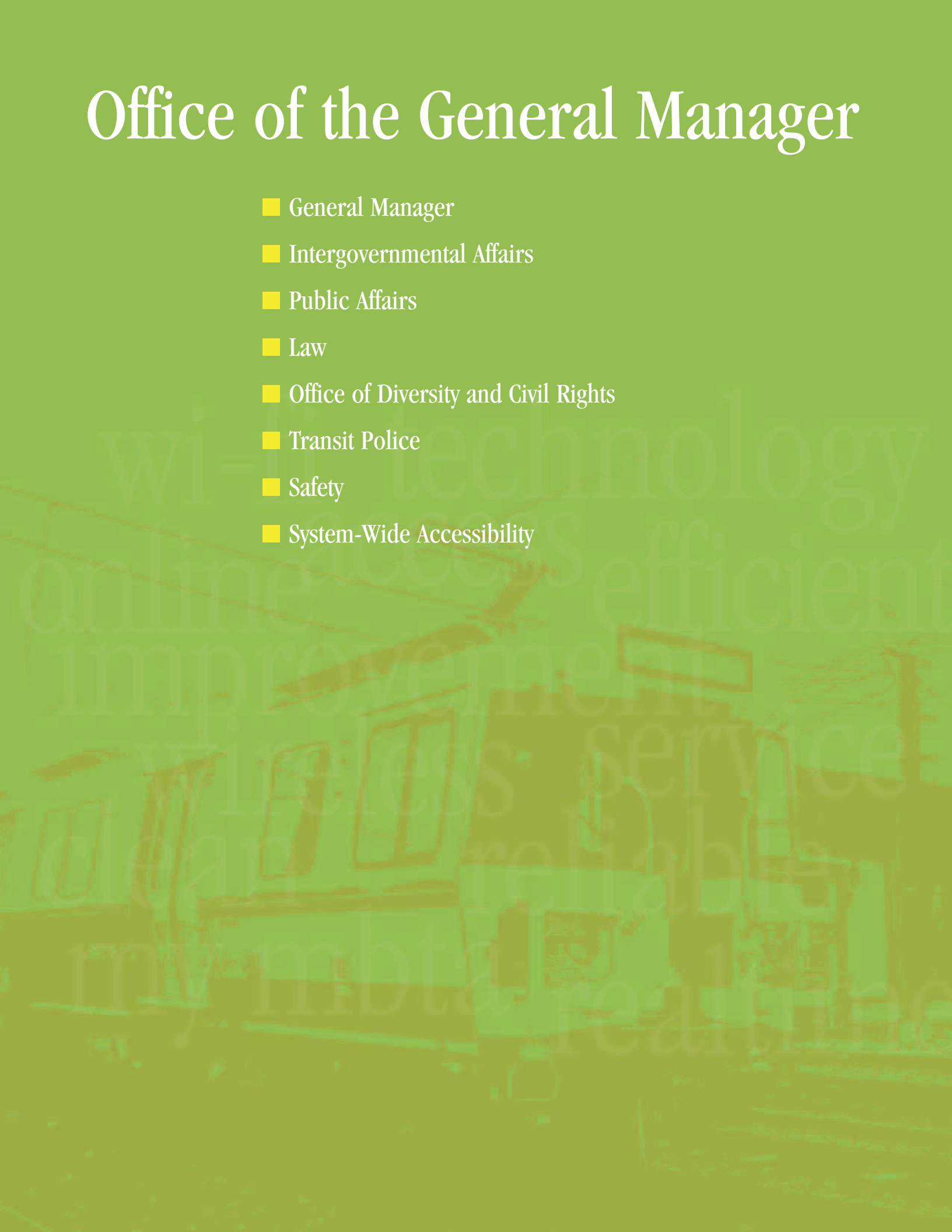
Office of the General Manager

- General Manager
- Intergovernmental Affairs
- Public Affairs
- Law
- Office of Diversity and Civil Rights
- Transit Police
- Safety
- System-Wide Accessibility



General Manager

The General Manager, guided by Administration goals and Board of Directors' policy, directs the Massachusetts Bay Transportation Authority's daily operations and administrative functions, and charts the Authority's long-term strategy. The General Manager's office establishes management policies and practices and sets standards of excellence.

The Office of the General Manager ensures the Authority's accountability to the taxpayers of the Commonwealth. The General Manager directs the Authority's support of the Commonwealth's environmental, legislative, and economic agendas.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Fiscal Stability	Increase ridership on all modes	Increase customer service Automatic Fare Collection System Increase parking availability Improve state of repair of the system	
	Increase Non-Fare Revenue	Transit-oriented development Creative advertising	
Service Reliability	Revenue Vehicles	Continue to increase fleet reliability, dispatching and scheduling, and on-time performance on all modes Improve performance and accuracy of electronic display sign system	
System Preservation	State of Good Repair	Continue focus on upgrading stations, replacing and modernizing the rail fleet, maintaining the promise to keep the bus fleet's average age under 8 years, bringing more stations into compliance with the Americans with Disabilities Act, adding elevators, escalators and bathrooms, etc.	
	Cleanliness	Increase standards for bus, train, light rail, and commuter rail Increase standards for station cleanliness, including bathrooms and elevators Improve winter snow and ice clearing on platforms and stairs	
	Revitalize facilities	Achieve maximum impact/minimum cost upgrades at select stations by improving lighting, painting, signage and benches using in-house forces Continue the Bridge Rehabilitation Program	
Courtesy and Improved Customer Service	Institute new customer enhancements/amenities	Rollout of T-Alerts Rollout of MBTA.com Mobile Rollout of Commuter Rail Wi-Fi Pilot Program - 2007/2008–Full rollout beginning 2008 and completed by 2009 Rollout of Commuter Boat Wi-Fi Continue to improve signage throughout the system	
Accessibility and Access to the System	Key Station Plan	Continue accessibility upgrades at Green Line surface stations and other key stations	
	System Accessibility	Continue to improve access to MBTA facilities and vehicles Continue Travel Training Program to expand use of fixed-route services by registered users of THE RIDE	
	Vertical Transportation	Improve system-wide availability of elevators and escalators	
Automated Fare Collection	Continue the success of the CharlieCard program	Reduce fare evasion, increase customer choice and ease-of-use, increase interaction with customers Continue customer education and respond to feedback Begin design for expanded use of the CharlieCard on the Commuter Rail and Commuter Boat networks as well as parking	
System Enhancement and Expansion	Greater access to transit, environmental justice, and geographic equity in the system	Enhancement of the Fairmount, Worcester and Fitchburg Lines Work with the Commonwealth on other expansion projects such as the Fall River/New Bedford Line, Medford/Somerville Green Line extension, Silver Line Phase III and the Blue Line extension	
System Safety and Security	Transit Watch/See Something, Say Something	Continue to develop and implement programs to increase public, passenger and employee security/safety awareness	
	Station Management	Continue to enhance safety and security on the system Continue to conduct internal security/safety audits to ensure the highest level of security and safety for our system Continue our ongoing Anti-Terrorism readiness for all police officers, to include the Special Operations Team, Explosive Detection K-9's and Bomb Technicians Continue the cooperative efforts between the MBTA Police Officers and other MBTA personnel regarding system security by involving a vast variety of employees in the Anti-Terrorism preparedness training Conduct and participate in regular drills with federal, state, and local agencies	
TOTAL BUDGET			**$1,475,230**

Intergovernmental Affairs

The Intergovernmental Affairs Department acts as the MBTA's liaison to federal, state, and local officials, as well as other state agencies.

Members of the Department confer with legislators and other government officials on issues they present regarding MBTA activities in their communities. Members of the Department also provide elected officials with information regarding the MBTA's position on various issues. The Department also handles hundreds of requests for assistance and transit-related inquiries from elected officials and their staffs.

The Intergovernmental Affairs Department monitors MBTA-sponsored bills, tracks legislation that impacts the Authority, and monitors committee hearings and executive sessions. The Department follows the daily sessions of the House and Senate and makes recommendations on MBTA-related legislation pending before the Legislature and the Governor.

The Department provides the General Manager and senior managers with background information regarding legislative developments.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Local, State, and Federal Relations	Legislative tracking	File and track transit-related bills Monitor daily legislative sessions and committee hearings Make recommendations on pending bills Track legislative mandates	$346,353
	Inquiries by government officials	Respond to inquiries by elected and non-elected government officials Attend civic and community meetings	
	Inter-agency coordination	Coordinate legislative activities with other transportation agencies	
TOTAL BUDGET			**$346,353**

Public Affairs

The Public Affairs Department is responsible for maintaining communication with MBTA customers, the general public and the news media. The Public Affairs staff disseminates daily information pertaining to MBTA service, policies, and upcoming events. In addition, the staff monitors the quantity and quality of media coverage regarding the MBTA to ensure the accuracy of information reported. Public Affairs staff is on-call to respond to all media inquiries.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Media Relations	Press releases and media advisories	Generate news releases on MBTA service, policies and upcoming events	$204,550
	Media tracking	Produce daily newsclips for senior managers	
	Responding to reporter inquiries	Respond to daily media inquiries	
	Media contact	Contact reporters and media outlets to encourage them to cover a particular MBTA event	
	Letters to the Editor	Respond on an as-needed basis	
Customer and Community Outreach	Information requests	Respond to public inquiries	
	Newsletters and flyers	Produce flyers on service changes	$23,000
TOTAL BUDGET			**$227,550**

Law Department

The Law Department provides legal counsel with respect to the Authority's operations and prosecutes and defends the Authority's legal rights in state and federal courts and agencies. The Department is divided into four sections: Trials and Claims, Business Law, Employment, and General Law.

Aggressive management of claims and lawsuits has reduced judgment and settlement costs from $11.3 million in FY 2002 to $10 million in FY 2008, a $1.3 million or 12% reduction in injuries and damages payments. The Department also expects to increase income to the Authority by over $500,000 in FY 2009 by pursuing reimbursements from third parties for indemnification actions or property damage to MBTA equipment/structures.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Trials and Claims	Claims and lawsuits	Manage 4,000 to 5,000 claims and 500+ lawsuits Settle 1,000+ claims Resolve a substantial amount of outstanding claims and lawsuits against the Authority valued at $48 million Maintain a win ratio of 70%	$3,298,256
	Property damage recovery	Increase the recovery ratio by 10% Conduct 30+ trials Handle appellate matters as they arise Manage 14 law firms representing the Authority in personal injury litigation	
	Other advice	Defend Authority employees involved in criminal matters arising out of transportation-related activities Provide Authority-wide training support in legal affairs/claims reduction education Provide instruction and training for Authority employees with respect to legal matters involved in Authority operations	
Construction Contracts	Construction contracts	Resolve 90% of outstanding claims Review 80 change orders Represent the Authority in 8 contract dispute negotiations Review 20 design agreements and 75 amendments Review 20 contracts Manage 5 law firms representing the Authority in contract-related litigation	$1,016,531
	Materials contracts	Resolve 90% of contract disputes/claims Review 30 materials contracts Review 35 change orders for materials contracts Review 75 agreements Represent the Authority in 3 contract dispute negotiations Manage 4 law firms representing the Authority in contract-related litigation	
	Consultant agreements	Review 75 agreements Negotiate terms and conditions for 30 personal service letter agreements	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Construction Contracts (cont.)	Operating agreements	Review 25 agreements for railroad, bus, and maritime transportation services Negotiate disputes with respect to 6 agreements Coordinate with bond disclosure counsel	
	Other advice	Represent the Authority at public hearings	
Real Estate/ Environmental	Property Issues	Conduct 12 eminent domain takings Handle 100 other real estate issues Coordinate real estate disposition program with TRA Manage 6 law firms representing the Authority in eminent domain litigation Manage 2 law firms representing the Authority in environmental litigation	
General Law	Administrative law matters	Try or resolve, as appropriate, all cases filed prior to 2008 Prosecute or defend applications for injunctive relief, as requested Act as liaison to law firms representing the Authority in governmental and constitutional litigation	$106,722
	Other Advice	Assist other agencies and Authority officers, other departments, and other sections, as requested	
Employment Law	Agency and court	Resolve all MCAD cases filed through 2007 Resolve federal and state court actions through trial and/or mediation Manage 10 law firms representing the Authority in employment litigation	$914,611
TOTAL BUDGET			**$5,336,121**

The Office of Diversity and Civil Rights

The Office of Diversity and Civil Rights (ODCR) is the major component in the Authority's effort to provide an inclusive work environment that fosters an atmosphere of dignity and mutual respect. The role of this department is to develop system-wide policies and procedures that promote inclusion and equity among all employees. ODCR monitors and initiates equal opportunity in employment and civil rights compliance through its three program functions: Government Compliance, Equal Employment Opportunity/Affirmative Action, Civil Rights Complaint Investigation & Resolution.

The Government Compliance unit (GC), includes the Disadvantaged Business Enterprise program (DBE) and is primarily responsible for monitoring the Authority's compliance with federal, state, and local laws and regulations, as well as ensuring the participation of Minority-owned, Women-owned, and Disadvantaged Business Enterprises (M/W/DBE) in MBTA contract opportunities. This unit participates in inter-agency outreach and marketing strategies that are targeted at increasing DBE participation. Procedures for monitoring goods and services contracts further enhance DBE participation in MBTA contracting. This unit also oversees development and implementation of Title VI Customer Civil Rights Programs and aspects relative to the Americans with Disabilities Act (ADA).

The Equal Employment Opportunity/Affirmative Action unit (EEO/AA) develops and conducts a wide variety of targeted internal and external outreach programs aimed at creating and retaining a diverse workforce. EEO/AA also monitors the Authority's hiring practices to ensure compliance with state and federal government regulations. The unit maintains active partnerships with colleges, universities, trade and professional groups, and community-based organizations for the recruitment of qualified, diverse candidates. Staff members participate in selected job fairs and undertake specialized recruitment efforts to assist protected group applicants in gaining employment opportunities with the Authority. The EEO/AA unit coordinates and develops diversity programs that celebrate the culture of various ethnic groups to increase awareness and communication on diversity issues. EEO/AA also develops and distributes the Authority's Equal Employment Opportunity and Prevention of Harassment Policies; monitors personnel transactions; writes the Authority's Affirmative Action Policy; and executes initiatives to ensure equal opportunity.

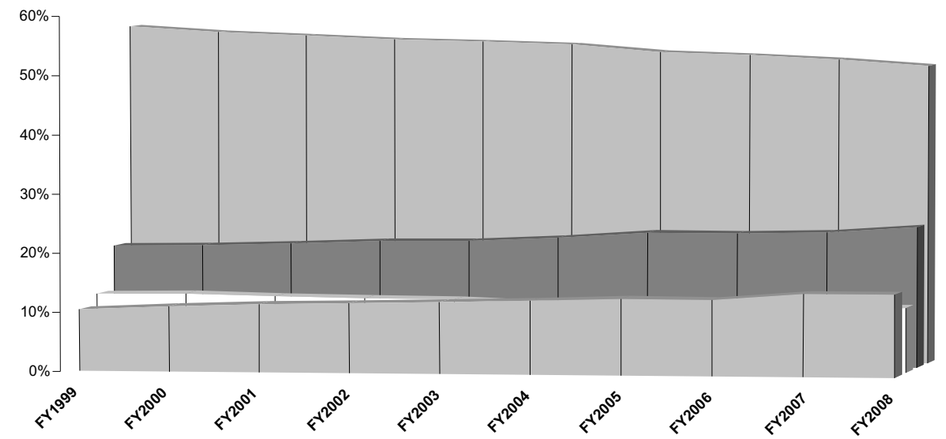
EEO/AA staff enters, monitors and analyzes data to track hiring, discharges, and other employment practices, in addition to reporting the Authority's EEO/AA progress. ODCR coordinates all information relevant to monitoring the civil rights initiatives of each department. The goal of this function is to perform analyses and produce statistical information on all workforce data in order to assist the Authority in identifying its workforce trends. By monitoring, reporting, and setting goals for all personnel transactions, this unit helps to ensure Authority-wide equal opportunity.

The Civil Rights Investigation and Resolution unit (CRI) is charged with monitoring the Authority's policies of non-discrimination in the workplace, as well as monitoring both state and federal laws and the Massachusetts Attorney General's Agreement to ensure compliance. Civil Rights Investigators (CRIs), under the guidance of the Assistant Director of CRI, conduct diligent, impartial and confidential investigations of all allegations of discrimination, harassment, and retaliation that are filed by employees and applicants. CRI provides mediation and facilitated dialogues to resolve workplace conflicts and non-civil rights disputes, and monitors the work environment to help create and support a fair workplace for everyone.

CRI also conducts Anti Discrimination and Harassment Prevention training (ADHP), as well as DiversiTy Training Workshops. These training programs focus on educating both supervisory and front line employees on issues of civility, discrimination, harassment, and retaliation in the workplace, while outlining expected behaviors and responsibilities of all Authority employees.

The Office of Diversity and Civil Rights plays a dominant role in the enhancement of cultural diversity and inclusion at the MBTA and in the Authority's compliance with Civil Rights laws (Title VI, Title VII, and ADA). Project initiatives are based on a number of factors, including: needs assessments, interventions, workforce and/or public comments and suggestions, current events, and compliance evaluations. ODCR initiatives provide new models of intervention as a strategy to improve the work environment, services and communication between the Authority's diverse workforce and the communities it serves.

MBTA Workforce Profile Over 10 Years
FY 1999 to FY 2008



	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008
Minority Females	10%	11%	12%	12%	12%	12%	13%	13%	14%	14%
White Females	12%	13%	12%	12%	12%	11%	11%	11%	11%	11%
Minority Males	20%	20%	20%	21%	21%	22%	23%	23%	23%	24%
White Males	57%	56%	56%	55%	55%	54%	53%	53%	52%	51%

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Government Compliance Programs, Contract Compliance/ Disadvantaged Business Enterprise (DBE) 49CFR Par26	Increase M/W/DBE outreach (Advertisement)	Provide information on the MBTA's Disadvantaged Business Program to minority- and women-owned businesses and prime contractors to increase utilization	$116,142
	Contract monitoring	Maintain 12.7% DBE participation for construction contracts, professional services, and goods and services	
	DBE regulatory compliance and reporting	Monitor, track, and report on DBE participation on federal/state contracts, sub-contracts, suppliers, vendors, and other participation in Authority contracts	
Equal Employment Opportunity/ Affirmative Action (EEO/AA) (Title VII)	Recruitment	Ensure EEO/AA parity; establish affirmative action plan and utilization goals; monitor and analyze workforce data; increase representation of qualified diverse candidates within underutilized job groups; develop resources within the community to provide job access to diverse candidates	$170,301

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Civil Rights Requirements (FTA, EOT, MCAD)	Complaints/investigations/intake and resolution	Investigate civil rights complaints; ensure compliance with EEO and anti-harassment policies and procedures; identify problem areas and assist in resolution of civil rights and non-civil rights complaints; increase compliance with federal and state civil rights laws, Title VI, VII, 151b, and ADA	$464,907
	Utilization analysis	Ensure EEO/AA compliance and continuation of critical funding by monitoring and reporting statistical information on workforce data; set goals for compliance; implement programs to address needs and monitor and report progress	
Civil Rights Monitoring, Compliance, and Reporting	Title VI and VII monitoring and reporting	Ensure federal and state EEO/AA compliance and continuation of critical funding by monitoring, maintaining, and reporting statistical information on all workforce data	$66,301
Community Outreach	Events sponsorship and diversity awareness celebrations	Provide multi-cultural awareness of MBTA career opportunities and increase culturally diverse job applicants	$120,301
	Internal diversity celebrations	Increase multi-cultural awareness and recognition of diverse groups; networking	
	Poster/pamphlet campaigns	Increase internal awareness of the functions and services delivered by the Office of Diversity and Civil Rights	
Training	Civil rights, policy and procedures and diversity inclusion training	Promote non-discrimination in the workplace; decrease incidents of discrimination, harassment, retaliation, and disparate treatment; increase responsible management practices	$269,320
	Diversity awareness and cross-cultural skills development	Improve cultural competence; increase awareness and sensitivity, communication, management skills, and interpersonal interactions; decrease complaints	
	Alternative dispute resolution/mediation	Increase resolution of complaints and conflicts internally using the most cost-effective manner; decrease the number of formal complaints through mediation, training, etc.	
	Strategic planning	Ongoing assessment of diversity needs; establishment of goals and objectives, remedial programs, and action plans	
TOTAL BUDGET			**$1,207,272**

TRANSIT POLICE DEPARTMENT

The mission of the MBTA Transit Police Department is to ensure a safe environment within the transit system to reduce fear, and to promote the confidence of the riding public through community policing. Our fundamental duties are to safeguard lives and property within the transportation system, and uphold the constitutional rights of all people by following a set of core values that reflect the finest nature of policing, which are: Fairness, Truthfulness, Professionalism, Perseverance, Treating All Persons with Dignity and Respect, Service Before Self, and Integrity.

The Transit Police Department accomplishes this mission by utilizing a combination of patrol techniques and strategies involving mobile patrol in order to ensure a rapid response to calls for service, as well as line assignments conducted by both uniformed and plainclothes officers. Coverage is provided through a program of both scheduled (directed) and random patrols of transit stations and properties within the four (4) Transit Police Service Areas (TPSAs), ensuring coverage of the core system on a system-wide basis. The implementation of a patrol strategy based on geographically defined TPSAs has enabled the Department to maximize coverage and maintain a high degree of visibility on the transit system while also being responsive to local community needs.

The Transit Police Department was one of the first transit agencies in the United States to implement anti-terrorism training and preparedness measures. This extensive training, which was initiated prior to the events of 9/11, combined with the purchase of state-of-the-art equipment and specially trained Explosive Detection K-9s, placed the MBTA Transit Police Department on the leading edge of preparedness for a terrorist incident. The training has been expanded to include training for MBTA inspectors, operators, and other employees.

Anti-Terrorism/Security Enhancement Programs

In addition to an improved relationship with the community resulting from the TPSA program, which enhances the exchange of information and bolsters the Authority's overall security posture, the Transit Police Department has also instituted several programs focused directly on anti-terrorism. The programs include the implementation of Impact Teams that provide focused, high visibility security patrols throughout the core transit system, and an ongoing Security Inspection Program. Security Inspections are conducted on a random basis at both Commuter Rail and Subway stations. Explosive trace detection equipment and explosive detection dogs are used in pre-payment areas and onboard vehicles to check bags/packages being carried by MBTA customers. The program is designed to deter and prevent the attempted introduction of an Improvised Explosive Device (IED) into the transit system.

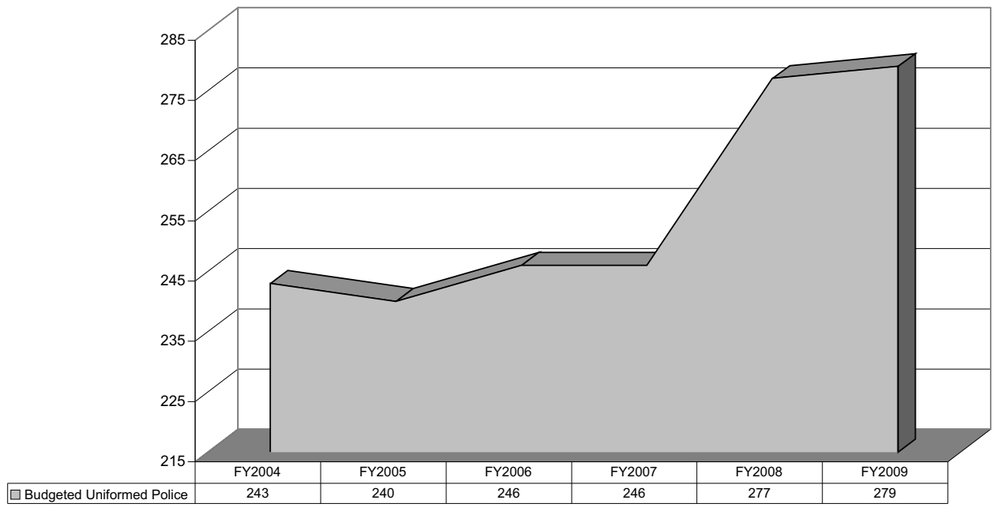
The MBTA Transit Police Intelligence Unit is responsible for the gathering, processing and dissemination of information and intelligence that pertains to the security of the MBTA. The Unit works closely with federal, state and local law enforcement agencies as well as various public and private entities. The unit serves as a central repository for information and intelligence, with the goal of maximizing the ability to detect, prevent, apprehend, and respond to criminal and terrorist activity that could impact the security of the MBTA and any other public or private transportation systems in the state of Massachusetts.

Transit Police Service Areas

There are four geographically based and one functionally based (Headquarters) TPSAs, each under the command of a Lieutenant. The four geographical service areas are responsible for staffing the patrol beats of their respective areas and provide police coverage throughout the transit system. Each geographical TPSA includes Sergeants and Police Officers assigned to foot and vehicle patrol. The Headquarters commander is responsible for phone and radio communications as well as prisoner processing and confinement.

System-wide police coverage includes 195 police personnel, 4 TPSA reporting stations and 10 police kiosks.

Budgeted Uniformed Police
FY 2004 to FY 2009



PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
TPSA Patrol Plan	Transit Police Service Areas	195 Police personnel 4 TPSA reporting stations 10 Police kiosks Provide police coverage throughout the transit system Security Inspection Program & Impact Teams	$17,290,515
Investigation and Prosecution	Court prosecution	Prosecute more than 3,000 court cases Conduct approximately 2,000 criminal investigations Conduct more than 300 internal security or major investigations Intelligence Unit	$3,000,000
TOTAL BUDGET			**$20,290,515**

Investigation and Prosecution

The Criminal Investigations Unit is responsible for investigating crimes and incidents that occur on MBTA property and within MBTA Transit Police jurisdiction, including Commuter Rail incidents. The Unit conducts all death investigations in conjunction with the District Attorneys' offices and has primary jurisdiction for all criminal acts perpetrated on the MBTA Transit System. The Unit is supported in its mission by Crime Scene Services. Additionally, the Criminal Investigations Unit works in close partnership with the Boston Police Youth Violence Strike Force and numerous other local and federal agencies on various investigative initiatives. The Unit conducts approximately 2,000 criminal investigations annually.

The Internal Security Unit is responsible for internal security investigations within the Authority, with particular attention focused on revenue security, including the fraudulent use or purchases of transit and Commuter Rail passes. This unit is also responsible for the investigation of all MBTA employee-related criminal activity (excluding MBTA Transit Police employees). Due to the sensitive and confidential nature of their activities and investigations, personnel assigned to this function report solely and directly to a Deputy Chief, the Investigative Services Division Commander. The unit generally conducts over 300 internal security investigations each year.

Court Prosecution

The Court Case Management (CCM) Unit files criminal complaint applications and oversees the prosecution of over 3,000 criminal cases per year. It is also responsible for processing and maintaining all drug and property evidence and found/recovered property. CCM personnel also process and track all non-criminal citations issued by MBTA personnel.

Safety Department

It is the mission of the Safety Department to maximize MBTA system safety through the design, implementation, support, and oversight of safe work practices. The success of this mission will ultimately enhance and ensure customer, employee, and public safety/security. Furthermore, this mission is accomplished by managing the development and implementation of policies and procedures that govern the safety of MBTA vehicles, Rights-of-Way (ROW), fire/life safety, facilities management, and occupational and environmental safety practices. As such, the Safety Department plays a critical role in supporting MBTA departments to perform their designated tasks and responsibilities safely as outlined in the System Safety Program Plan, System Security and Emergency Preparedness Plan, Emergency Operations Plan, and the Safety Policies and Procedures Manual.

Examples of critical Safety Department activities include: developing and implementing the Emergency Response & Exercise Program through the MBTA Drill Steering Committee; managing the Internal Safety/Security Audit Program; tracking passenger, industrial, and vehicle accidents; developing and implementing programs to increase public, passenger, and employee safety awareness; reporting preventive and corrective solutions for identified safety hazards; establishing and maintaining safety guidelines through employee training programs; performing safety audits of all MBTA stations, facilities, vehicles, and Rights-of-Way; and working with other departments in controlling or eliminating risks associated with Workers' Compensation, passenger claims, and litigation.

The principal goal of the Safety Department is to develop and coordinate activities that focus on the prevention of serious incidents and accidents. This is accomplished by collaboration with all departments – operating, construction, and administrative – to utilize a hazard identification and resolution process to ensure that safety and security concerns are identified and the appropriate mitigation strategies are employed. The Safety Department is responsible for reporting all required safety and security data to the National Transit Database (NTD) and the Department of Public Utilities (DPU). This data is utilized by the FTA to track accident/incident trends in the industry.

Finally, the Safety Department is a critical part of the Authority's emergency response team, providing emergency response 7 days per week, 24 hours a day. Safety officials are responsible for chairing Derailment Investigations and serve as lead investigators for serious accident investigations. To effectively meet its obligations, the Department operates through four (4) interdependent functional units: Safety Administration and Information; System Safety Engineering; Passenger, Vehicle, Construction, and Right-of-Way Safety; and, Safety Training.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Safety Administration & Information	Implement and monitor all State System Safety/Security Oversight requirements	Prepare annual Federal Transit Administration (FTA) State Oversight Safety Performance Report Design & implement required Safety/Security Audit Program Prepare annual audit report for the Department of Public Utilities (DPU) Revise & update existing System Safety Program Plan (SSPP) and submit to DPU for approval Maintain hazard management matrix	$497,112
Safety Administration & Information (cont.)	Record & report all required safety/security data to NTD and DPU	Prepare and manage all required FTA accident reporting requirements. Maintain data collection system to report required safety & security data to NTD Implement Form B Program and reports outcomes to DPU	
System Safety Engineering	Implement the Safety Certification Program	Prepare Safety Critical Checklist for construction projects and/or vehicle procurements Ensure that all design specifications/plans are reviewed at each required interval Prepare Safety Certification documents	$210,967
	Coordinate all Fire Safety initiatives with Boston Fire Department Coordinate safety inspections for the Authority's Loss Control Program Provide Industrial Hygiene consultations	Conduct system audits of fire/life safety related procedures and equipment readiness Acts as a liaison to facility insurers to ensure compliance with required standards Provide air quality and Department of Labor (DOL) workplace assessments as required	
Passenger, Vehicle, Construction, and Right-of-Way Safety	Monitor Right-of-Way Safety	Coordinate and conduct ROW safety audits Monitor the effectiveness of the ROW Safety Rulebook	$512,503
	Conduct Accident/Incident Investigations	Ensure compliance with the Authority's Accident Investigation Policy Investigate major accidents on behalf of the DPU	
	Participate in safety/security policy & procedure development	Develop policies and procedures governing safety, security, & emergency management	
Safety Training	Direct Emergency Response Exercise & Drill Program	Facilitate the Authority's Drill Steering Committee Conduct two (2) Full Scale exercises annually Ensure interagency collaboration with regard to emergency preparedness response activities	$315,834
	Provide and consult on Safety Training throughout the Authority	Provide training to local municipalities and emergency responders on Authority-related operations Partner with Operations in the implementation of ROW safety training Participate in T University and other Authority training programs	
TOTAL BUDGET			**$1,536,416**

System-Wide Accessibility

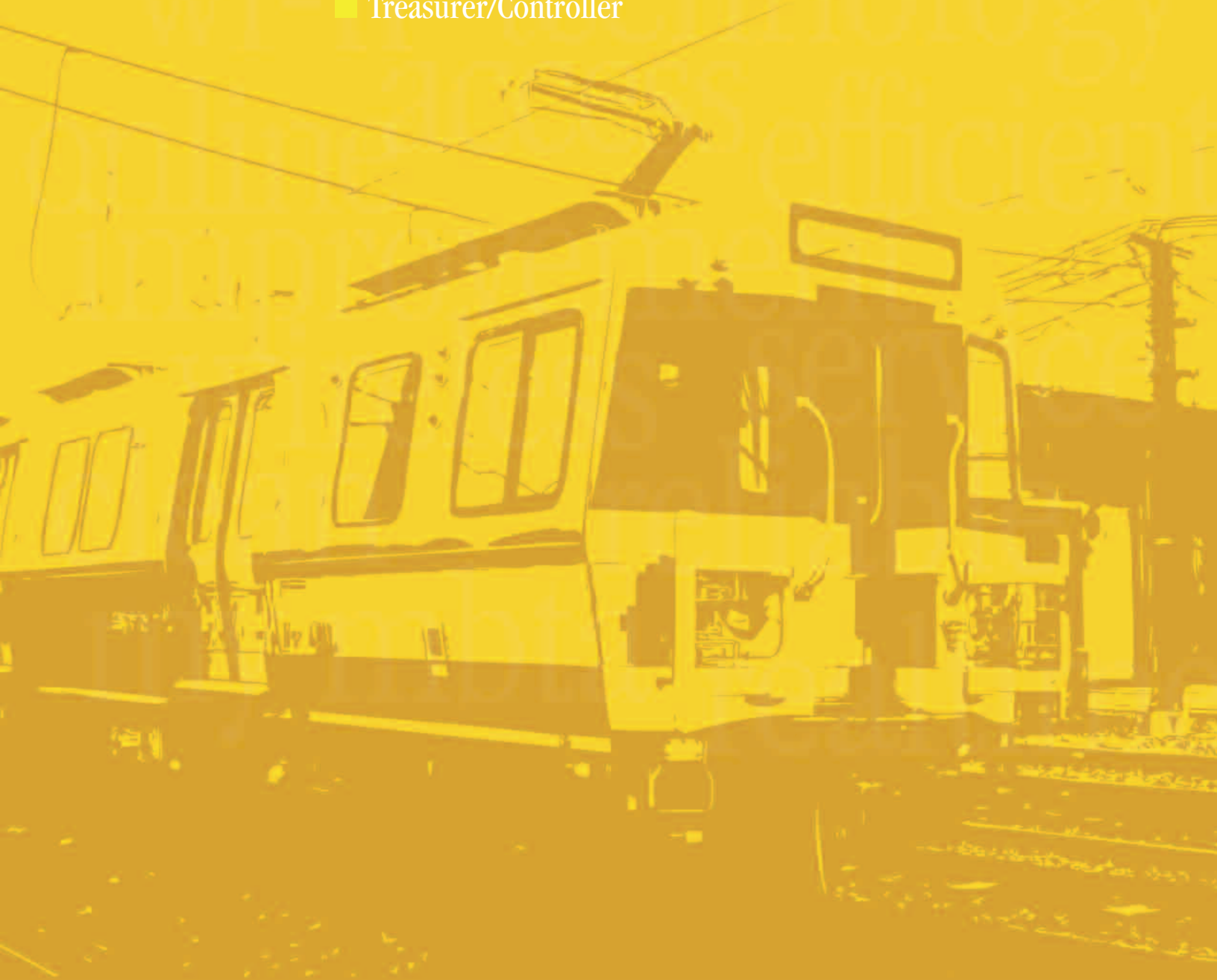
The System-Wide Accessibility Department directs the development, implementation, interdepartmental coordination and management of the Authority's efforts to carry out its goal to improve accessibility to public transportation for customers of all abilities and to carry out responsibilities as mandated by the Americans with Disabilities Act (ADA).

In line with the Authority's legal requirements as set forth in the Boston Center for Independent Living (BCIL) settlement, this Department ensures compliance with the settlement and coordination of the implementation of its various components, including, but not limited to, developing further means to improve accessibility to MBTA services, ensuring as part of their regular duties and responsibilities that all departments and components of the MBTA comply with all access requirements, educating customers with disabilities about all existing MBTA accessibility services, and encouraging public awareness in providing accessible services to persons with disabilities.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Improve accessibility	Americans with Disabilities Act and BCIL Settlement Compliance	Development, implementation, interdepartmental coordination and management of the Authority's efforts to carry out its goal to improve system-wide accessibility for all customers Ensure compliance with the MBTA/BCIL settlement agreement and all applicable local, state and federal accessibility requirements and coordination of requirements throughout the Authority	$1,509,641
	Establish guidelines for designing accessible transportation facilities, vehicles and provide accessible and compliant program access	Update and publish the "MBTA Guide to Access" design guide in hard copy and electronic formats; integrate "MBTA Guide to Access" into all existing MBTA design guidelines	
TOTAL BUDGET			**$1,509,641**

Deputy General Manager/Chief Financial Officer

- Budget
- Information Technology
- Materials Management
- Compliance and Reporting
- Treasurer/Controller

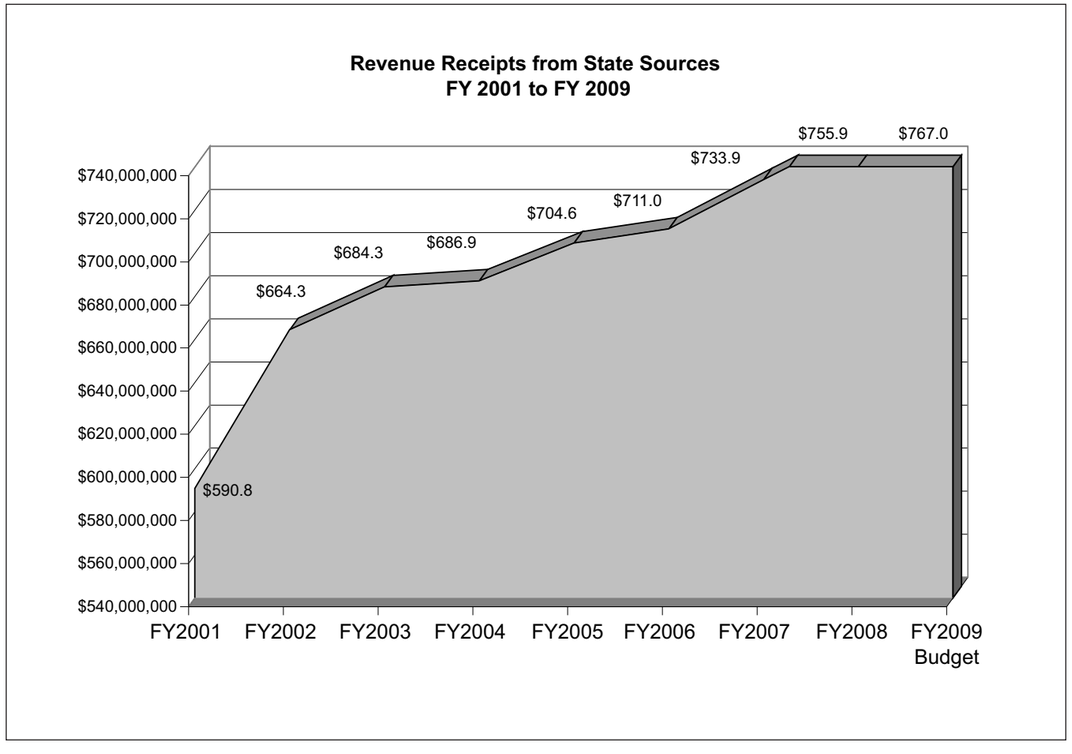


Budget Department

The Budget Department implements and monitors the allocation of financial resources within the MBTA. Established budgets ensure that the Authority's goals will be prioritized and met in the most cost-efficient manner.

The Budget Department works with the Authority's managers to develop operating and capital budget programs and the five-year Capital Investment Program. In addition, the Department works to identify and secure federal and local funding on the Authority's behalf. Capital projects are analyzed in the context of needs and available resources. The Department analyzes requests for resources, identifies funding sources, monitors staffing levels and provides financial and statistical data to support the MBTA's decision-making process.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Operating Budget	Prepare operating budget request	Develop annual operating budget and submit to Board of Directors and Advisory Board Produce and distribute annual Budget Book	$238,662
	Financial control	Monitor operating expenses and initiate corrective measures to ensure adherence to budget Review contracts, purchase order requisitions, travel authorizations, and staff summaries for approval	
	Reports	Prepare financial performance reports – weekly Prepare regular and overtime spending reports – weekly Prepare headcount variance report – monthly	
Capital Budget	Program capital projects/funding	Develop, manage and update the five-year Capital Investment Program Analyze Capital Program cash requirements Assist in the preparation of the Program for Mass Transit and the Transportation Plan (25-year planning documents)	$224,012
	Financial control	Monitor sources/uses of capital funds Maintain/update project budgets on the Capital Management System Review for approval all capital work order authorization requests – 100 monthly Review for approval all capital purchase order requisitions – 50 monthly	
	Conduct analysis of capital spending/financing	Prepare capital budget analyses	
Federal Program	Legislative effort	Monitor and prepare recommendations relative to federal transit legislation Identify annual federal transit funding levels	$173,030
	Federal Transit Administration (FTA) Grant Program	Prioritize federal transit projects in the context of available funding Prepare and submit grant applications to the Federal Transit Administration and Transportation Security Administration, amounting to over $250 million annually Coordinate federal meetings/issues with appropriate MBTA personnel Assist in the preparation of the Transportation Improvement Program (a three-year schedule of federal funds)	
TOTAL BUDGET			**$635,704**



Information Technology Directorate

The Internet and other new information and communication technologies are revolutionizing the way services are delivered and organizations are structured. Electronic business processes change the ways organizations operate and conduct business. Opportunities to lower transaction costs and improve efficiency have changed relationships between transit agencies and their suppliers and customers, and they are likely to change industry structures in the longer term.

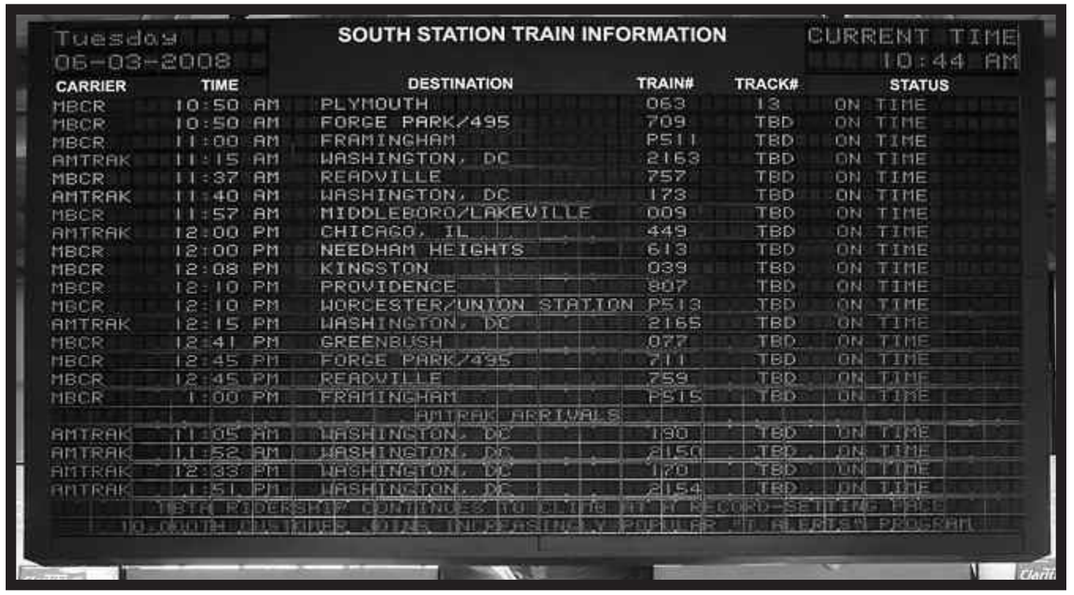
The declining costs of communications, data storage, and data retrieval are accelerating the opportunities spawned by the Internet and other information and communications technologies. Choosing and sequencing investments in technologies, processes, and people to reduce costs and increase productivity present challenges to the MBTA. ITD assists internal partners to weigh the costs, benefits, and risks of changing the ways services are delivered.

ITD will be crafting and implementing Infrastructure and Desktop Strategies such as:

- Desktop Strategy:
  - Upgrade MBTA employee personal computing and networking
  - Provide integrated system with single sign-on
  - Retire out-of-date software
  - Assure integrated and secure access to desktop, laptop, email, and Intranet
  - Conversion to Microsoft environment with emphasis on Security, Exchange, Outlook and NAC
  - Utilizing Active Directory allowing integration with Hastus, HCMS and financial systems
- Develop holistic Information Security and Privacy policy
  - Provide training and guidance across organization
  - Achieve Highest Level of PCI Compliance
  - Educate partners and suppliers
- Develop a Storage and Server Computing strategy centering on concepts of Storage Area Network using Blade servers and virtualization
- Implement a transition plan to incorporate the AFC Central Computing System
- Establish a Disaster Recovery/High Availability Capacity Authority-wide
  - Offer internal clients this service for their critical applications and data
- Partner with SMI/Telecom to leverage network and upgrade telephony
  - Better voice mail, employee directory, voice capability
  - Provide better in-house support for Call Center
  - Leverage existing purchases for ACD
  - VoIP development
- Develop an executive “desktop dashboard”
  - Partner with Operations Technology
  - Identify technology solutions and create views to key databases
- AFC
- Operation Key Performance Indicators

ITD provides ongoing technical support on multi-discipline project teams for the development and implementation of systems such as: a new maintenance control reporting system (MCRS); Automated Fare Collection (AFC); enhanced Human Capital Management System (HCMS); financial systems; and application development for DORMS, Maximus, Hastus, AFC and Police CAD/RMS.

Utilizing technology, the MBTA can provide superior customer service that helps us focus on the strategic goal to deliver safe, accessible, dependable, clean, and affordable transportation.


Tuesday
06-03-2008
SOUTH STATION TRAIN INFORMATION
CURRENT TIME
10:44 AM
CARRIER TIME DESTINATION TRAIN# TRACK# STATUS
MBCR 10:50 AM PLYMOUTH 063 13 ON TIME
MBCR 10:50 AM FORGE PARK/495 709 TBD ON TIME
MBCR 11:00 AM FRAMINGHAM P511 TBD ON TIME
AMTRAK 11:15 AM WASHINGTON, DC 2163 TBD ON TIME
MBCR 11:37 AM READVILLE 757 TBD ON TIME
AMTRAK 11:40 AM WASHINGTON, DC 173 TBD ON TIME
MBCR 11:57 AM MIDDLEBORO/LAKEVILLE 009 TBD ON TIME
AMTRAK 12:00 PM CHICAGO, IL 449 TBD ON TIME
MBCR 12:00 PM NEEDHAM HEIGHTS 613 TBD ON TIME
MBCR 12:08 PM KINGSTON 039 TBD ON TIME
MBCR 12:10 PM PROVIDENCE 807 TBD ON TIME
MBCR 12:10 PM WORCESTER/UNION STATION P513 TBD ON TIME
AMTRAK 12:15 PM WASHINGTON, DC 2165 TBD ON TIME
MBCR 12:41 PM GREENBUSH 077 TBD ON TIME
MBCR 12:45 PM FORGE PARK/495 711 TBD ON TIME
MBCR 12:45 PM READVILLE 759 TBD ON TIME
MBCR 1:00 PM FRAMINGHAM P515 TBD ON TIME
AMTRAK ARRIVALS
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AMTRAK 11:52 AM WASHINGTON, DC 2150 TBD ON TIME
AMTRAK 12:33 PM WASHINGTON, DC 120 TBD ON TIME
AMTRAK 1:51 PM WASHINGTON, DC 2154 TBD ON TIME

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Information Technology Services	Maintenance of current applications, operating systems, and hardware	Provide the Operations Control Center System with environmental and network support Provide support for the Maintenance Control Reporting System, Incident Reporting, and Dispatchers Log System Support for fuel alley automation Ensure systems availability for all applications including mission critical ones such as: • Capital Management Systems • Collaborative Systems • E-Commerce for pass purchases • Operations Work Selection (PICK) System • Human Capital Management System (HCMS) • Financials & Materials Information System (FMIS) • SCADA • Workers' Compensation System	$6,169,353
New Systems and Existing Systems Enhancements	Wide Area Network expansion	Support the AFC network to be PCI DSS compliant by segregating the network, employing firewalls to control access, and placing IDP (intrusion detection protection) devices on the network Upgrading of existing networks at 10 Park Plaza and 45 High Street for network optimization and security	$1,542,338
	Enhanced functionality for MBTA.com	Mobile MBTA.com; real-time T Alerts; Trip Planner integration with Google maps, translation services, on-line applications for employment	
	Development of Employee IntraNet	Provide a business tool for resource sharing and collaboration, increasing productivity and lowering costs	
	Enhance and expand use of Human Capital Management System (HCMS)	Implementation of additional modules for Payroll and E-Recruit	
	Financials & Materials Information System (FMIS) development and implementation	Increased availability and timeliness of financial information; improved line tracking of materials, purchases, related payments, and committed invoices, new automation of inventory control	
	New MCRS2 System (Maximus)	Support for the CNG bus implementation, real-time interface with materials, and the addition of incident reporting	
	Automated Fare Collection System	Support for the AFC implementation, transition of the central computer system	
TOTAL BUDGET			**$7,711,691**

Materials Management

Materials Management purchases, receives, stores, and distributes materials, equipment, and supplies, as well as service contracts to support the activities of all departments. Central stockrooms for inventory materials are located in Everett and Charlestown. Materials from these locations are distributed to 17 satellite locations and many other non-inventory locations, where bus and subway equipment maintenance is performed. Working with the Office of Diversity and Civil Rights, concerted efforts are taken to maximize Disadvantaged Business Enterprise (DBE) involvement in procurement opportunities.

The Vehicle/Systems Procurement Department supports the Authority's capital program related to revenue service vehicles and complex system initiatives. This includes the purchase of and subsequent contract administration efforts for new vehicles, overhaul programs and new systems programs.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Procurement	Evaluate, plan and procure inventory and non-inventory materials requirements	Comply with purchasing policies and procedures; focus attention on the FTA's recommendations Optimize Central Stores inventory levels	$1,888,942
	Include DBE and Massachusetts firms in MBTA procurement opportunities	Meet DBE participation goals and further development of overall supplier base	
	Expand use of "Best Value" procurements	Obtain goods and services required at the overall best value to the Authority	
	Manage vehicle and major system procurements	Conduct appropriate procurements Monitor contractual compliance Support technical staff Coordinate with related departments/agencies Resolve and finalize contractual issues	
Storerooms	Evaluate/maintain appropriate stock levels	Review Monthly Valuation reports by Type and Location to insure changes in inventory levels are consistent with fleet adjustments and maintenance activity levels	$2,404,108
	Maintain accuracy and integrity of inventory through cycle count and physical inventories	Cycle count reports Physical inventory reports	
	Improve warehouse operations by continual analysis and modification of storage techniques at all of our inventory locations	Track number of transactions versus operating cost ratio Procure and install module cabinet to improve efficiency	
	Set up facilities and storage equipment to support new vehicle procurement	Track inventory levels by valuation, item count and usage for new vehicles	
	Research and implement new technologies to increase efficiencies	Implement Highjump data collection system and Peoplesoft update	
	Identify and dispose of obsolete materials to free up resources.	Measure actual reduction against annual goal using Obsolescence Report. Goal set at end of current fiscal year	
TOTAL BUDGET			**$4,293,050**

Compliance and Reporting Department

The Compliance and Reporting Department is responsible for providing analysis and recommendations to the Chief Financial Officer on a variety of issues and functions that support the financial activities of the MBTA. One of the primary responsibilities of the Compliance and Reporting Department is to oversee and manage the filing of financial reports and financial compliance matters. In addition, the Department undertakes projects that support other departments under the purview of the Chief Financial Officer, including the Treasurer-Controller and Budget departments. Staff also contributes to the development and implementation of debt strategy and the debt issuance process, management of the long-term financial plan of the MBTA, provides forecasting guidance and relevant trend analysis, as well as the solicitation and evaluation of financial proposals submitted to the MBTA by investment bankers, consultants and other entities on a variety of issues. At the request of the Chief Financial Officer, staff also provides oversight and management of special projects and the development of new financial policies, including a variety of cross-organizational and non-fare revenue initiatives.

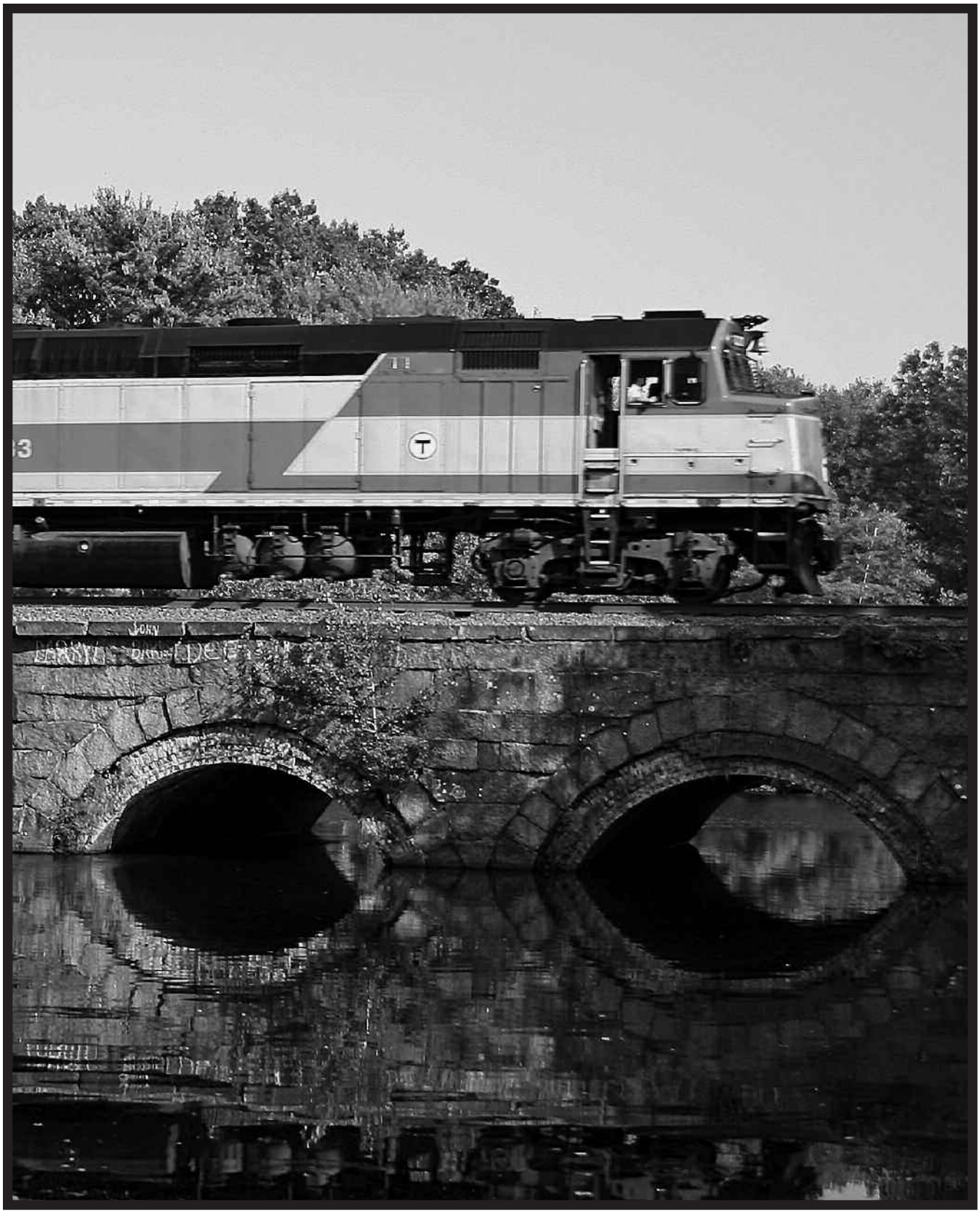
PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Support of Authority Financial Activities	Compliance and Reporting	Oversee and manage the filing of financial reports and financial compliance matters Undertake projects that support other departments under the purview of the Chief Financial Officer, including the Treasurer-Controller and Budget departments	$968,141
	Debt Management	Contribute to the development and implementation of debt strategy and the debt issuance process	
	Financial Planning	Management of the long-term financial plan of the MBTA Solicit and evaluate financial proposals submitted to the MBTA by investment bankers, consultants and other entities on a variety of issues	
	Forecasting & Trend Analysis	Provide forecasting guidance and relevant trend analysis	
	Project Management	Oversee and manage special projects and develop new financial policies, including a variety of cross-organizational and non-fare revenue initiatives	
TOTAL BUDGET			**$968,141**

Treasurer/Controller

The Treasurer/Controller's Department manages the Authority's financial resources, which amount to more than $1.8 billion in annual cash flow. These include payments, borrowing, investing, accounting, preparation of financial statements, billing and collection of receivables, the purchase of insurance, and revenue collection and counting of cash.

The Treasurer-Controller continues to improve service through aggressive solicitation of financial services, enhanced cash management, and focused integration of the Authority's financial systems.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
MBTA Vendor Payments	Process vendor payments and resolve outstanding issues	Process 74,642 operations vouchers annually Process 6,535 capital vouchers annually	$237,929
Payroll	Process all employee and retiree payments	Process 25,900 paychecks monthly	$614,784
	Verify and process timekeeping information	Process 19,900 time records weekly	
Financial Statements and Reports	Prepare monthly, quarterly, and annual accounting and budget reports	Prepare 12 monthly closing statements Prepare quarterly financial status reports for 55 federal grants Prepare the National Transit Database Report (formerly Section 15 Report)	$1,194,443
	Monitor capital funding, external audits, and fixed assets inventory	Monitor and report all local bond and federal grant expenditures Supervise all audits Oversee update of annual "Indirect Cost Allocation Plan" Manage Authority's Fixed Assets accounting, which includes 11,500 property records	
	Prepare cost assessments	Prepare annual assessment figures of $146,486,060 and schedules for 175 MBTA communities	
	Manage and control accounts receivable	Process 3,675 bills for collection annually	
Cash Flow and Investments	Provide daily cash management and maximize investments	Invest excess cash in high rate securities through a weekly bid process	$313,810
	Initiate and coordinate the sale of notes and bonds	Sell bonds and other securities as necessary to fund capital programs	
Insurance Programs	Administer the Authority's insurance program	Purchase and administer cost-effective insurance protection excess of reasonable retentions	$94,430
	Review contracts for indemnification and insurance provisions	Ensure that contractual exposures are properly insured, commensurate with the level of risk	
Fare Collection and Distribution	Delivery and collection of money	Timely collection, counting, and deposit of fare revenue for 512 fare vending machines and 1,738 fareboxes	$6,495,015
TOTAL BUDGET			**$8,950,410**



Deputy General Manager for Planning and Development

- Environmental Management
- Planning and Development
- Real Estate/Facilities Management

Environmental Management Department

The Environmental Management Department (EMD) is responsible for: environmental planning and permitting of construction projects and improvements to infrastructure; environmental assessment and cleanup of MBTA properties and acquisitions; and administration of the MBTA's Environmental Management System.

Environmental Planning and Permitting of Construction Projects and Improvements to Infrastructure

EMD works cooperatively with the Design and Construction Department, Planning Department, Real Estate Department and Operations to identify potential environmental impacts of construction projects and improvements to infrastructure. The EMD works with departments to ensure that applicable environmental review processes are conducted and performed in accordance with federal, state, and local regulations. The EMD works to identify the environmental operational needs of a proposed facility, or improvements to infrastructure, and incorporate them into the construction project at an early stage to ensure that the facilities are built and permitted with final operational requirements in mind. The EMD works to relocate maintenance facilities from urban neighborhoods to industrial locations where feasible. The review processes, approvals and permits identified and required in construction projects include, but are not limited to, NEPA review, MEPA review, wetland and coastal zone permits, waterfront access permits, historic preservation permits, water quality certification, soil management plans, storm water management plans, etc. The EMD monitors projects to ensure compliance with permit conditions. If violations occur and enforcement actions result, the EMD acts as the lead for the Authority with the appropriate federal and state agencies.

Environmental Assessment and Cleanup of MBTA Properties and Acquisitions

The MBTA is one of the largest landowners in the Commonwealth. Private railroad companies that either went out of business or entered bankruptcy previously owned a large amount of the land currently owned by the MBTA. These properties, used as transportation and industrial properties for decades, have environmental conditions associated with their prior use that must now be addressed under applicable regulatory requirements. The EMD works to bring each of these into compliance in a cost-effective manner with the timeline and requirements laid out in the Massachusetts Contingency Plan (MCP) and applicable federal regulations. The EMD also ensures that environmental conditions at operating facilities are managed and in compliance with the Clean State Program and the MCP. The EMD also works with the Real Estate and Law Departments to appropriately allocate environmental risks relating to leases, acquisitions, and the sale of property by the MBTA.

Environmental Management System

Operations at the MBTA are subject to a wide range of federal, state and local environmental regulations. The Department's Environmental Management System (EMS) provides a disciplined framework for meeting our environmental responsibilities and continually improving our performance. The EMS establishes policies and standard operating procedures to ensure that our operations and facilities are in compliance. Working with Operations to conduct inspections and audits, the EMS identifies areas of non-conformance and establishes corrective action plans. The EMS provides support to all departments for obtaining and maintaining necessary permits and approvals. Additionally, the EMS assists in maintaining compliance with environmental commitments, agreements, and settlements.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Environmental Permitting in Construction Projects and Improvements to Infrastructure	Environmental Reviews	Develop appropriate environmental review documents for MBTA construction projects Review adjacent development projects for potential impact on MBTA properties	$284,024
	Environmental Permitting	Monitor environmental permits and approvals during the closeout of construction of the Greenbush Line Successfully permit projects consistent with MBTA and FTA standards so that construction projects can be put out to bid without unnecessary delays	
	Historic Preservation	Prepare federal and state historic preservation documents prior to construction bid and award	
	Construction Compliance	Address community concerns regarding environmental impacts during construction	
Environmental Assessment and Cleanup of MBTA Properties and Acquisitions	Acquisitions Remediation	Minimize or eliminate DEP non-compliance findings in new acquisitions	$162,299
	Construction Projects Remediation	Assist in updating MBTA Project Manager Manual to provide Design and Construction staff with appropriate information on environmental standards and how they apply to MBTA projects Minimize or eliminate regulatory non-compliance findings during construction	
	Facilities Remediation	Successfully manage site-specific remediation at MBTA facilities and properties in accordance with state and federal requirements	
	Clean State Compliance	Bring all facilities into compliance with Clean State standards by dates specified in the MBTA/DEP Consent Agreement	
Environmental Management System	Environmental Management System	Continue to expand and develop the system-wide EMS. Identify effective means to ensure regulatory compliance at operating facilities	$365,174
	Settlements, Agreements, and Obligations	Maintain and update newly established timelines, schedules, and projects to meet requirements of the State Implementation Plan (SIP) and Central Artery Commitments Maintain and update established timelines, schedules, and projects for environmental settlements and agreements	
	Facilities Compliance Monitoring	Investigate and recommend improvements to existing information systems to track environmental compliance at facilities Develop and implement comprehensive self-auditing and inspection system	
TOTAL BUDGET			**$811,497**

Planning and Development Department

The Planning and Development Department coordinates Project Development Group reviews, organizes the project definition phase of capital project planning and develops long-term strategic plans for improving the MBTA's infrastructure network and operations system. Through various analytical processes, the Planning Department determines the feasibility and impact of projects on the MBTA. The Planning Department plays an important role in coordinating the Authority's policies and priorities regarding such projects with other state agencies, local governments, advocacy groups, and the Metropolitan Planning Organization (MPO).

Among the Planning and Development Department's objectives for FY 2009 are to complete the update of the Program for Mass Transportation; undertake capital studies regarding system capacity needs and infrastructure assessment; define project scope for capital plan improvements; and coordinate interdepartmental project development reviews.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Program Development	Analysis of project alternatives and/or feasibility	Complete project development for Assembly Square, Fitchburg Line Small Starts Program, Lechmere Station, and Commuter Rail Layover needs analysis Organize Project Development Group reviews in implementing MBTA capital program Assist EOT in technical review/development of capital projects (State Implementation Plan transit commitments, Assembly Square, South Coast Rail, Wachusett extension, Urban Ring, and North Shore Major Investment Study)	$233,282
	Technical planning studies	Implement system benchmarking monitoring program Initiate follow-up project development analyses based on needs identified in the Program for Mass Transportation recommendations	
	Long-range transit planning and goal setting	Complete update of Program for Mass Transportation (to be completed in 2008) Prioritize parking and system enhancement initiatives	
	Community planning efforts	Site and Corridor planning for projects including Fairmount Corridor, Dudley South, Woburn parking, Rockport, Salem, Beverly, Wonderland, and Yawkey/Fenway area. Coordinate "Bikes-on-the-T" Program	
Interagency Coordination	Metropolitan Planning Organization (MPO) participation	Represent the Authority and General Manager at the MPO, the regional organization for planning and programming of federal transportation funds Act as project liaison to city and town governments, state agencies, regional transit authorities, business groups, and regional transportation management associations	$100,000
TOTAL BUDGET			**$333,282**

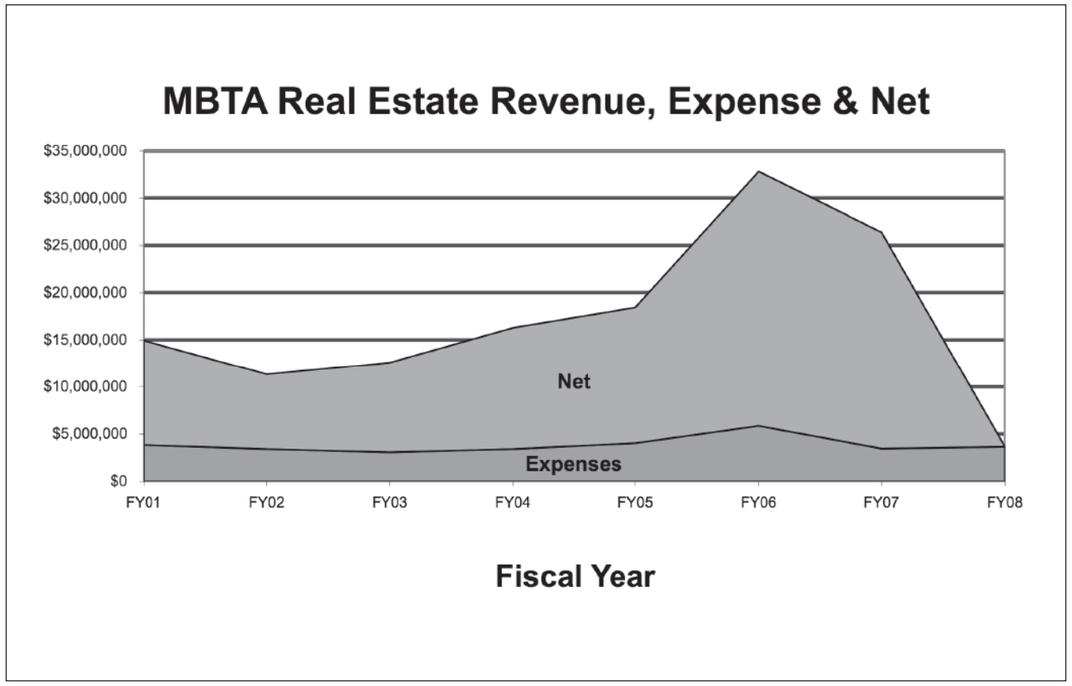
Real Estate/Facilities Management

The Real Estate Department consists of two divisions: Real Estate and Facilities Management. The Real Estate division, through its asset manager, Transit Realty Associates (TRA), oversees the management of the MBTA's vast real estate holdings. TRA has been managing the MBTA's real estate assets since 1997. A new five-year contract with TRA commenced on August 1, 2007.

Asset management includes the following: conducting all new leasing, licensing, sale, and easement transactions; managing existing leases and license including the collection of rents and enforcement of lease/license terms, acting on the identified encroachments on MBTA land, working with operating departments on real estate issues, and maintaining the LandTracker GIS inventory of property owned by the MBTA. The Real Estate Department and TRA are tasked with maximizing non-fare revenue from all sources and to work together to identify and advance appropriate revenue generating, lease, sale and development opportunities.

The Facilities Management division is responsible for department relocations, office and cubicle reconfigurations, and warehousing of equipment and records. Facilities Management also oversees the motor pool of MBTA vehicles and provides all in-house printing services.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Real Estate	Manage leases for 10 Park Plaza and South Station Train Terminal, as well as operating contracts for South Station Bus Terminal, North Station Parking Garage, and Wellington-Mystic Center	Payment of rent and utilities for 10 Park Plaza	$3,283,085
	Optimize return from MBTA's real estate assets through sale, lease, and license of Authority property	Advertisement of RFPs for surplus properties Re-bidding of all expiring leases Processing requests for licenses	
Facilities Management	Service moving and warehousing needs of MBTA departments	Department relocations Office and cubicle reconfigurations Warehousing of equipment and records	$232,732
	Manage MBTA's motor pool		
	In-house printing services	Provide in-house printing services for the entire MBTA	
TOTAL BUDGET			**$3,515,817**



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Deputy General Manager for Systemwide Modernization

Systemwide Modernization

Systemwide Modernization

The Systemwide Modernization Department serves in the capacity of advancing automation and customer service of the MBTA's transit system. Through various new technologies, this department is directly responsible for enhancing security initiatives around unauthorized access and intrusion detection to subway and bus system portals as well as garage and bus yard infrastructures. The Department is also responsible for the site selection, design and development of a redundant Operational Control Center that will enable the MBTA to operate its transportation infrastructure from a remote location, as opposed to its primary operating control center. Systemwide Modernization is also comprised of various operating divisions that introduce new fare collection technologies, provide audit services for fare revenue, and maintenance oversight for all automated fare collection equipment.

Automated Fare Collection Division

The Automated Fare Collection (AFC) Division provides direct oversight of the Authority's Station Management Project (SMP) and is responsible for implementing state-of-the-art automated fare collection equipment throughout the subway and bus systems. This division is directly responsible for coordinating all design, testing, installation and commissioning of all new AFC equipment, as well as ongoing software changes and updates. This equipment includes fare vending machines and fare gates in the subway system and bus and light rail fareboxes designed to provide enhanced service and customer options. Upgrades to the revenue collection facilities back-office equipment and systems have been designed to provide more efficient functionality and use of resources. Finally, the new integrated central computer and garage computer system will interface with all system equipment elements. The central computer system will assure the Authority's ability to effectively monitor and report on all performance and required system maintenance activity.

This division will be expanding its responsibility to include the coordination of all design, testing, installation, and commissioning of new equipment for Commuter Rail, parking and MBTA Ferry Boat operations. This equipment will primarily include cashless fare vending machines, retail sales terminals for area merchants, and fare media validation equipment that will be distributed throughout the entire network of commuter rail stations and MBTA owned parking locations.

AFC Equipment Maintenance Division

The AFC Equipment Maintenance Division is responsible for the preventative and corrective maintenance associated with farebox, garage, fare vending and subway station fare gates system-wide, as well as ticket office equipment. The complexity and magnitude of maintenance coverage has significantly grown as a direct result of full implementation of the new automated fare collection equipment. The AFC Equipment Maintenance Division is directly responsible for more than 3,300 pieces of equipment and during this fiscal year will take over all workbench repairs as warranty coverage ends for the new AFC equipment.

Station Management Project

The Station Management Project introduced an improved experience to our MBTA customers in the following areas:

- Convenient ways to purchase passes and fares
- Flexible passes and tickets, and
- Ease of use

New communication infrastructure, customer service improvements, back-office money management systems, as well as enhanced station and employee management structures have been developed and deployed as a result of activity generated from the AFC Division. AFC has successfully begun and transitioned the process for transforming the Authority's ability to efficiently manage its stations, provide enhanced customer service, improve fare collection, and improve the general safety environment of the MBTA system.

These improvements in operating efficiencies are being achieved and maintained through a number of components: the construction and operation of six Hub Stations linked to newly installed CC-TV cameras, passenger intercoms, fire alarms, elevator and escalator alarms, fare vending equipment alarms and other safety systems. Many of the above referenced systems have been connected through a fiber optic-based wide area network (WAN) that will extend throughout the subway system. The WAN, which is also supported within SMP, is a critical component of the communications infrastructure necessary for the AFC equipment, CC-TV cameras and other systems and alarms highlighted above.

With the deployment of AFC to the core system successfully completed, the Station Management Project will now shift much of its focus to converting Commuter Rail, Ferry Boat, and MBTA-owned parking facilities to automated fare collection equipment. This initiative will involve new equipment and technologies on a wider deployment scale and renewed equipment design, development, testing and installation.

Revenue Audit and Administration Division

The Revenue Audit and Administration Division is responsible for oversight of the MBTA's Corporate Pass Program and the preparation of monthly revenue reports and related journal entries. This division utilizes the new technologies made available as a direct result of the automation introduced by the new AFC equipment, and will work to develop new interfaces between the AFC Central Computer System and PeopleSoft Financials. These interfaces will expedite the MBTA's ability to accelerate the monthly close process through the elimination of several outdated manual processes.

In addition, the division will be restructuring its operation to refocus its efforts on performing periodic audits of revenue collection equipment, reporting, and field collection compliance. Once improved automation of the monthly reporting process is established, staff will be able to enhance their ability to perform a wider array of revenue auditing activities.

Finally, this division oversees the management and operation of the Authority's transit and commuter rail parking facilities by third-party contractors. Moving forward, the division will continue to explore new technologies that focus on introducing automated fare collection initiatives to the parking division similar to those established in subway, bus, and light rail operations.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Fare Collection Auditing	Ensure fare compliance	Perform 15 weekly fare audits Perform 15 weekly station observation audits Balance 99% of accounts by the 10th of each month Service all accounts by the 25th day of each month	$494,427
Fare Media Procurement	Design and development of fare media and new ticket types	Inventory of smart cards and magnetic tickets to maintain a steady state system operation	$1,974,288
AFC System Software Maintenance/ Technology Development	Continued implementation of AFC Contract	Completion of three system software upgrades Completion of AFC System Acceptance Testing Planning of future electronic fare payment strategies	$1,046,735
	Provide engineering support	Design, test and implement enhancements to Bus, Subway and Green Line AFC Equipment	
	Introduce fare policy modifications	Coordinate, test and implement changes to fare structure, new ticket types and screen displays	
	Improve customer interfaces	Design and implement new screen flows for all fare vending machines (FVMs), ticket office machines (TOMs), retail sales terminals (RSTs), fareboxes, and fare media validators (FMVs)	
	Expand customer service fare media network	Increase distribution outlets for reduced fare customers, students, employers, etc.	
	Audit data system and reports	Review data system generation requirements, data warehousing/data mining, and interface	
	Introduce special project applications and services	Expand AFC applications to the parking system, Commuter Rail system, security access system, and other related programs	
Third Party Initiatives	Monitor third party support	Develop RFPs and conduct oversight of internet sales, Corporate Pass Program, and other related initiatives	$1,935,605
Pass Program	Pass account administration	Receive pass returns monthly	$119,639
AFC Equipment Maintenance	Preventive and corrective maintenance	Complete 3200 average monthly corrective maintenance actions to AFC equipment Complete 350 monthly preventive maintenance actions to AFC equipment	$3,604,006
	Equipment workbench repair	Complete 145 weekly fare vending machine inspections	$1,988,942
		Complete 400 weekly farebox inspections	$1,024,954

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Revenue Administration	Analyze revenue and expense information and provide recommendations to improve efficiencies	Prepare, distribute and review revenue reports on a timely basis	$386,889
	Provide financial/administrative support for Revenue Audit operations	Ensure effective financial controls	$344,544
TOTAL BUDGET			**$12,920,029**

Automatic Fare Collection (AFC)

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Program Management	Begin AFC Phase II Project for expansion of the AFC/CharlieCard system to Commuter Rail, Parking, and Ferry Boat service locations throughout the system	Successful update of the original AFC Phase I technical specifications to provide a comprehensive AFC System covering all MBTA transit and parking services Ensure that all contract specifications are met for unified system and equipment functionality Determination through factory testing that new equipment functions as designed Successful system integration	$4,000,000
	FTA Grant Management	Timely reporting to the Project Management Oversight Committee (FTA Oversight)	
Program Management	Oversee the design, installation, and contractual agreements specific to the procurement of automated fare collection equipment and related project activity for AFC Phase II	Ensure that project is completed on schedule and within budget	$30,500,000
TOTAL BUDGET			**$34,500,000**

Note: The above expenses are funded 100% from capital funds and do not impact the FY 2009 operating budget.

Chief Administrative Officer

- Audit Services
- Customer Support Services
- Human Resources
- Marketing Communications
- Labor Relations
- Occupational Health Services
  - Workers' Compensation
  - Medical Operations
  - Employee Assistance Program

Audit Services

The Audit Services Department serves as in-house consultants for the Massachusetts Bay Transportation Authority. The scope of services encompasses the examination and evaluation of the adequacy and effectiveness of the Authority's systems of management control and the quality of performance in carrying out its operations.

To ensure achievement of added-value results, Audit Services established a CPA Pool. The objective of this pool is to perform financial, operational, and compliance audits for the Board of Directors, the General Manager, and/or Senior Managers.

While meeting professional auditing standards, Audit Services promotes open and candid communication and a continuing spirit of cooperation toward the common objectives of protecting public assets and providing cost-effective services; monitors timely and effective implementation of audit recommendations; and guides management in the establishment and maintenance of systems to fortify management controls.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Performance and Operations Monitoring	Financial, compliance, operational and internal controls	Complete financial, compliance, operational and internal control audits/agreed-upon procedures Complete compliance audits on professional services and construction contracts	$70,185
	Support services to senior managers	Assist senior managers with audits utilizing the MBTA's CPA Pool	$23,200
TOTAL BUDGET			**$93,385**

Customer Support Services

Customer Support Services (CSS) is responsible for providing service information to MBTA customers. The staff responds to approximately 2,000 inquiries daily via telephone, email, letter and walk-in customers who seek a wide range of information about the MBTA and its services. The Customer Support Services team is composed of a diverse work staff, which provides translation services to MBTA customers in Spanish, French, Haitian Creole, and Cantonese. The Department also provides additional translation services through a translation vendor as needed.

Customer Support Services' management tracking system allows staff to electronically track customer calls from start to finish. It provides reports regarding complaints, commendations, and trends in service levels, allowing us to use these to make changes to our services to the benefit of our customers. This system is also used as a method of electronically communicating real-time information to the staff regarding service interruptions.

With the use of an Automated Call Distributor (ACD), the Customer Support Services Department is able to provide real-time call volume, call wait time statistics and reports. The ACD also provides customers with the ability to select a representative who speaks either English or Spanish.

Given our inevitable expansion as we provide internal departments with wide ranging support, Customer Support Services facilitates focus groups to explore how we can continuously improve our customer service delivery. The Customer Support Services team is dedicated to providing first-class service in a timely manner to all MBTA customers.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Customer Support Services	Service customer inquiries, complaints, and commendations	Respond, log, and track customer inquiries	$1,791,367
TOTAL BUDGET			**$1,791,367**

Human Resources Department

The Human Resources Department strategically manages several business functions by implementing fiscally sound practices without sacrificing any services it provides The Department serves as an internal resource to the MBTA, all applicants, employees and retirees while providing the highest level of customer service in meeting the staffing, learning, education, health, welfare and compliance needs of the organization. As part of its approach to human resources, the Department aligns itself with the overall goals of the Authority and supports the MBTA's mission to meet the transportation needs of the Commonwealth of Massachusetts.

The cornerstone of the Authority's success is its employees, and Human Resources provides a variety of services to the MBTA to ensure that it hires, develops, and supports the most talented and diverse workforce in Massachusetts. Every year, Human Resources recruits, tests, and interviews thousands of applicants to identify the most qualified candidates to fill vacancies across the MBTA. Through ongoing collaboration with departments, Human Resources works to identify fair and consistent methods by which all candidates are screened and selected in order to promote current employees and hire external applicants.

Human Resources then works with all employees to continually enhance the skills of the entire workforce. By offering training programs such as Tomorrow's Leaders, Human Resources is anticipating how the Authority's employees must be prepared to adapt to the increasing demands of technological advancement and customer expectations. A highly successful tuition reimbursement program is also managed and administered by the Department for those employees who independently choose to attend area colleges to enhance their skills.

Finally, Human Resources offers a benefits package and an array of services to ensure that the ongoing and unanticipated needs of the Authority's employees are always met. Through the management and administration of a competitive package of health, dental, child-care, and retirement programs, the Authority provides its employees and retirees with the physical, emotional, and financial stability that make the MBTA one of the premier employers in the state. Human Resources also recognizes the many twists life may bring and administers the Family Medical Leave Act, Sick Leave programs, life insurance and long-term disability coverage, and reviews accommodation requests under the Americans with Disabilities Act to support employees during these trying times.

Throughout the upcoming year, as it does every year, the Human Resources Department will work to improve its efficiency by implementing new technologies that enhance its current HRMS and applicant tracking systems. In addition, the Department will implement a Document Scanning and Workflow Project to better manage employee information. These systems enable Human Resources to record, manage, and report on all completed and ongoing transactions related to hires, retirements, promotions, benefits, wages, and training. With improved technology and an ongoing commitment to customer service, the Human Resources Department will remain a vital point of service available to all MBTA employees and retirees.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Employment	Recruitment and employment	Ensure that all job vacancies are posted	$1,290,387
	Applicant screening and tracking	Make recommendations in a timely fashion Complete reference checks on all recommended candidates	
	Process Job lottery	Maintain hire ready candidate pool of PT Bus Operator, PT Train Attendant, PT Streetcar Motorperson, PT Customer Service Agent and Track Laborer	
Compensation, Budget & Labor Analysis	Review and maintain job descriptions	Ensure that all job descriptions are up-to-date and accurately reflect the functions of the position	
	Wage and salary administration	Ensure that Per Forms are in compliance with collective bargaining agreements Maintain PeopleSoft Foundation Tables	
	Conduct labor analysis	Provide management with recommendations and analysis on policy design (i.e., position control) Maintain organizational charts	
	Expand utilization of PeopleSoft	Process, track, and report all personnel related activity on PeopleSoft	
	Monitor and maintain PeopleSoft	Maintain/audit PeopleSoft and provide reports Process quarterly transportation PICK accurately and timely	
	Prepare Absenteeism Report	Prepare and distribute monthly reports	
Training	Provide training for “Tomorrow's Leaders”	Accurately track employee training and ensure relevancy and content by reviewing feedback evaluations	
	Provide New Hire Orientation	Accurately track employee training and ensure relevancy and content by reviewing feedback evaluations	
	Assist with the implementation of the General Manager’s Training Initiatives	Assist in contract administration	
	Participate in Massachusetts State Police Online Academy - MBTA Transit Police	Accurately track employee training and ensure relevancy and content by reviewing feedback evaluations	
Human Resources Services	Support Employee Recognition and Charitable Contribution Programs	Administer Performance Recognition and Fall Charity Drive	
	Unemployment services	Monitor unemployment activity	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Educational Assistance	Educational Assistance Program	Track Educational Assistance Program and review vouchers for accuracy	$150,000
Child Care	Child Care Program	Track Child Care Program and review vouchers for accuracy	$169,803
Benefits and Human Resources Management Systems (HRMS)	Administer healthcare plans	Administer self-insured healthcare programs and COBRA plans for active/retired employees in the most cost-effective manner	$773,419
	Monitor Life, Accident, and Disability Insurance Programs	Manage life insurance, accident insurance, death benefits, and long-term disability insurance programs in the most cost-effective manner	
	Coordinate Retirement Plan issues with the Retirement Fund	Ensure Deferred Compensation Plan issues are resolved Ensure MBTA Retirement Fund issues are resolved	
	Maintain on-time enrollment account link with healthcare vendors	Ensure 100% accuracy of healthcare enrollments with Blue Cross, Harvard, Tufts, and Delta Dental	
	Conduct audits of medical and dental providers	Perform formal enrollment and claim audits of healthcare plans on a periodic basis	
	Collect premium co-payments from off-payroll MBTA employees	Maintain and enhance the accounts receivable system for employee premium co-payments	
Leave & ADA Programs	Administer Leave Programs	Administer FMLA, SNLA, and Military Leave of Absence Programs in the most cost-effective manner	
	Administer Sick Leave Plan	Ensure that all affiliated employees have verifiable medical documentation for their period of absence in order to receive sick leave benefits	
	Administer ADA	Administer ADA in the most cost-effective manner	
TOTAL BUDGET			**$2,383,609**

Marketing Communications Department

In FY 2009, Marketing Communications will build on and intensify its ongoing marketing efforts to position the MBTA as 100% customer-service driven, by leveraging its technology-based rider amenities and by showcasing initiatives that enhance the overall customer experience. In addition, Marketing Communications will seek new opportunities to generate increased non-fare revenue and to provide strategic interdepartmental support.

- Marketing Communications will continue to promote technology products, such as Mobile.MBTA.com, T-Alerts, Commuter Rail/Boat WIFI access, as cutting-edge customer-service tools that offer convenience and personalized service. In addition, the Semester Pass Program is expected to convert to CharlieCards during FY 2009. Together these technology tools and the CharlieCard conversion will lay the groundwork for the introduction during the year of the following anticipated new products:
- "Bike" CharlieCard – enabling customers to lock/unlock station bike cages and pay fare
- "Parking" CharlieCard – enabling customers to pay for parking and fare
- "University" CharlieCard – a pilot program enabling university students to pay for college fees and fare

The Department's robust marketing of these technology products will further position the Authority as an organization dedicated to continuous improvement and customer satisfaction.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Advertising, Promotion and Marketing	Strategy Development	Establish an ongoing dialogue that identifies the actions crucial to delivering value to our external customers and internal stakeholders. Through targeted assessment and analysis of various communication projects, we optimize opportunities by creating the blueprint to design and execute marketing communications plans. • Measures of successful marketing communications strategies include: - increased ridership - building awareness - media coverage - internal and external customer feedback - industry-wide recognition	$115,300
	Copy and Design Services	By following defined strategies, create written and visual solutions which include foundational advertising concepts such as: persuasion, color psychology, composition, copywriting, typography, and brand communication. Campaign tactics include but are not limited to: electronic media, broadcast, newspaper advertising, transit advertising and outdoor advertising. • Write and design a minimum of 20 primary marketing campaigns. • Develop the content and overall layout and design of over 200 unique projects including: four quarterly newsletters, two annual reports and two system maps.	$249,000
	Print Production	Ensure the final printed quality of all projects by trafficking and writing specifications, following Authority purchasing procedures, overseeing translations, attending press checks and meeting delivery schedules. • Oversee the print production of at least 200 projects.	$250,000
	Media Planning	Develop advertising schedules that are both effective and efficient by identifying the combination of media and the associated reach and frequency that will be most effective in delivering the key message to the target audience - while meeting marketing objectives and budget limits. Types of media include newspapers, trade magazines, internet and broadcast. • Create media plans for ten key projects.	$145,806
	Promotional Partnerships	Develop promotional partnerships to provide added value to taking the T, help draw new customers and assist in retaining current customers. Our partners include national brands, sports teams, and civic and transit organizations; while partnership elements range from co-branded car cards to station sampling to promotional discounts.	$173,000
TOTAL BUDGET			**$933,106**

To further bolster fare revenue, Marketing Communications will take advantage of the current spike in commuter ridership to promote the benefits, e.g., cost-savings and convenience, of using the MBTA during off-peak hours for recreational activities. Also, the Department will undertake a "parking lot" campaign, highlighting Authority lots that can accommodate increased usage.

Marketing Communications itself will embrace new technology to market new products and initiatives, employing e-mail blasts to targeted customer and special interest lists and purchasing advertising on select websites. This should effect cost-savings as well as advance the Authority's "green" initiative by reducing paper consumption.

As noted previously, Marketing Communications will contribute substantially to non-fare revenue generation in FY 2009. The Titan Outdoor Advertising contract enters its fourth year with revenues projected to exceed the Minimum Annual Guarantee. This year the Department's partnership both with Titan Outdoor and Clear Channel will not only generate significant income, but also provide subway riders with a new electronic media platform that will deliver real-time news and information and a more desirable customer experience. The Department expects its successful filming and sampling program will gain even more momentum this year as more major brand names and production companies seek to capitalize on Boston's growing market appeal.

Finally, Marketing Communications will continue to provide ongoing support in the form of logos, brand identity, newsletters, posters, flyers and related marketing collateral for the internal and external communications programs of other functional departments within the MBTA and the Executive Office of Transportation (EOT).

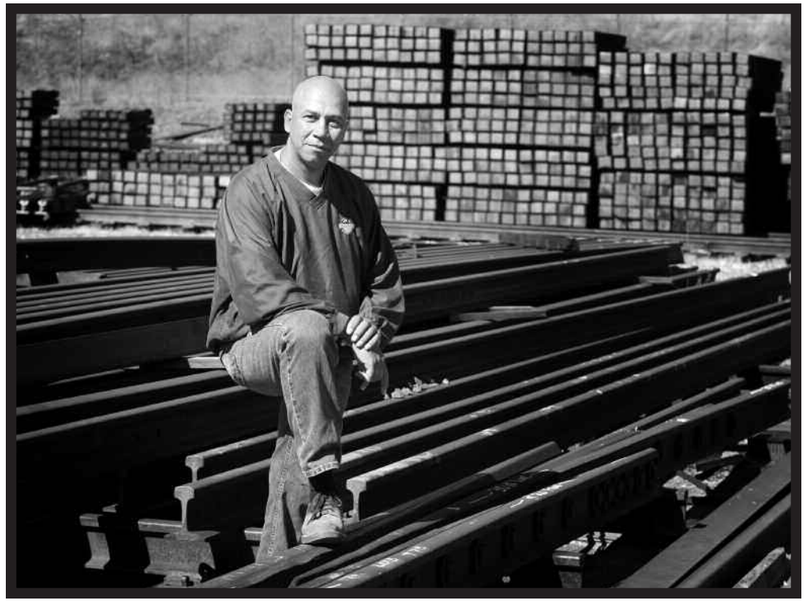
Labor Relations

The Labor Relations Department plays a crucial role in managing positive and productive relations between labor and management within the Authority. Labor Relations is responsible for negotiating labor contracts with the Authority's 29 unions and 16 collective bargaining units, which represent 97% of the MBTA's employees.

The Department also manages day-to-day labor issues, which include interpretation of provisions of collective bargaining agreements to assist all departments in achieving their goals; training of supervisory and management employees on union contract compliance, progressive discipline and grievance processing procedures; and representation of the MBTA in an average of 50 arbitrations and 460 grievance cases annually. In addition, Labor Relations represents the Authority in interest arbitrations when necessary.

Labor Relations oversees all unemployment compensation claims filed by MBTA employees. The Department is also responsible for review and processing of all discharge cases to the General Manager for final action.

Labor Relations represents the Authority's interests in various other forums, including The Civil Service Commission, Division of Administrative Law Appeals, Labor Relations Commission, Superior Court, Appeals Court and the Supreme Judicial Court concerning labor-related controversies.



PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
For the collective bargaining term July 1, 2006 through June 30, 2010, execute successor collective bargaining agreements with the Authority's bargaining units for agreements through negotiations and/or interest arbitration	Implement the interest arbitration award with Local 589 and continue negotiations with all other unions for successor collective bargaining agreements to replace those that expired on June 30, 2006	Sign new contract/implement interest arbitration awards	$426,862
Manage grievance processing in a cost-effective and timely manner assisting all departments with interpretation and application of the various collective bargaining agreements	Step 2 Grievance processing, General Manager Hearing, Mediation and Arbitration preparation	Process all grievances within contractual time limits	$461,211
Assist operating departments with implementation of MBTA Strategic Plan initiatives including Automated Fare Collection and introduction of new technology vehicles	Provide advice and assistance, and negotiate changes in collective bargaining agreement as needed	Successful implementation of initiatives	$79,555
Defend the MBTA's receipt of uninterrupted 13(c) federal funds	Monitor all Department of Labor certifications and 13(c) challenges	Favorable certification from Department of Labor	$31,185
Revise and redistribute the MBTA's disciplinary policy	Distribute revised Authority Discipline Policy	Ongoing training of operating personnel on revised policy	$7,213
Train managers and front line supervisors on contract and grievance administration, including rules enforcement, due process, and just cause standards	Teach ongoing Labor Relations module as part of monthly training program to all managers and supervisors Conduct ongoing Labor Relations Roundtables for Operations Management Assist with "Tomorrow's Leaders" training	Reduction in the number of grievances at the Step 2 Level that are sustained or require compromise settlements	$17,366
Work with all MBTA unions to ensure continued compliance with the Authority's EEO and Affirmative Action Plan	Assist the Office of Diversity and Civil Rights, the Law Department, and Operations with investigations and training as necessary	Timely resolution of complaints and successful defense of related Authority disciplinary actions	$79,453

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Assist operating divisions with the interpretation and implementation of the Authority's Drug & Alcohol, Americans with Disabilities Act (ADA), Family and Medical Leave Act (FMLA), and Small Necessities Leave Act (SNLA) policies	Respond to Operations on a case by case basis and continue to assist with issues during weekly meetings with senior management	Challenges to Authority's policies are unsuccessful in judicial and administrative arbitrations	$21,669
Participation in New Hire Orientation Program to familiarize new employees with the role of Labor Relations in the Authority	Continue to participate in all regularly scheduled sessions	100% participation in New Hire Program	$2,887
Assist the Absence Management Committee to curtail long-term absences and cost to the Authority	Continue to assist in this important ongoing initiative and continue to attend Absence Management Committee meetings with senior management	Number of long-term absences of one year or longer has decreased	
TOTAL BUDGET			**$1,127,371**

Occupational Health Services

Occupational Health Services (OHS) is composed of three departments: Workers' Compensation, Medical Operations, and the Employee Assistance Program (EAP). These three departments continue to work together to promote and maintain a safe and healthy work environment, while fulfilling the Authority's statutory obligations. Occupational Health Services develops, administers, and advises the Authority on policies and procedures designed not only to comply with statutory requirements, but also to promote a healthy and productive workforce.

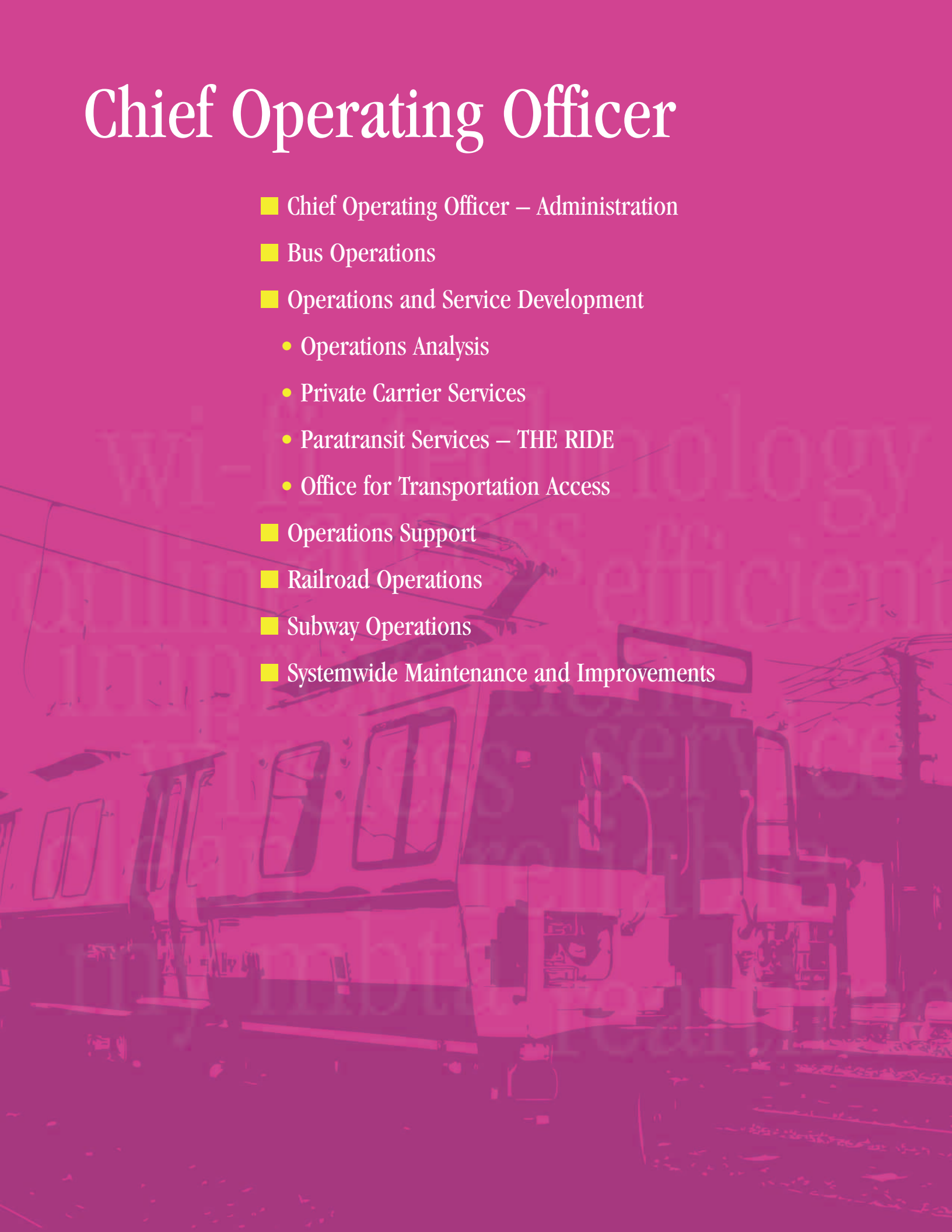
The FY 2009 goals for Occupational Health Services include the continued compliance with federal regulations for drug and alcohol testing and procedures. The Medical Clinic will maintain the fitness for duty standards for the Authority's workforce.

In an ongoing effort to sustain the low positive drug and alcohol testing rates, the Employee Assistance Program will provide continual drug and alcohol education. Workers' Compensation will continue implementing cost-saving measures throughout the Department, while providing injured employees with appropriate medical treatment. All of the Occupational Health Services departments will continue to join together in an effort to reduce employee absenteeism throughout the Authority.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Workers' Compensation	Processing claims	Monitor time frames on all claim payments, review documentation, and assign claims to investigation when needed Represent the Authority at the conciliation stage of the Industrial Accident Board procedure Represent the Authority in challenges of claims at the Department of Employment and Training Reduce outside counsel expenses	$506,958
	Risk management	Represent OHS on the Authority's Risk Management Committee	
	Monitor modified work assignments	Identify and assign injured employees to modified duty	
Medical Operations	Drug and alcohol testing	Meet federal and MBTA regulations as expressed in the MBTA Drug and Alcohol Policy and Testing Procedures	$813,387
	Medical evaluations	Ensure all applicants and MBTA employees meet the medical standards set forth by the MBTA and state licensure agencies	
Employee Assistance Program	Substance abuse evaluations and referrals	Meet federal regulations for substance abuse professional evaluations while reducing the overall recidivism rate of EAP participants	$196,883
	Critical incident stress management	Provide critical incident stress management for all employees involved in serious and/or fatal accidents	
	Education/Training	Provide drug and alcohol educational training in accordance with federal regulations and the Authority's Drug and Alcohol Policy	
TOTAL BUDGET			**$1,517,228**

Chief Operating Officer

- Chief Operating Officer – Administration
- Bus Operations
- Operations and Service Development
  - Operations Analysis
  - Private Carrier Services
  - Paratransit Services – THE RIDE
  - Office for Transportation Access
- Operations Support
- Railroad Operations
- Subway Operations
- Systemwide Maintenance and Improvements



Chief Operating Officer – Administration

The Chief Operating Officer is responsible for all MBTA operations including Bus, Subway, Commuter Rail, Operations Support, and Systemwide Maintenance and Improvements, as well as contracted services including water transportation, subsidized private carrier bus services, and THE RIDE. Collectively, these services provide 1.1 million passenger trips on a typical weekday.

The Chief Operating Officer oversees the procurement and maintenance of the vehicle fleet, operation of daily service, and management and maintenance of all the Authority's buildings and structures including power distribution equipment, signal systems, and rail right-of-way. The Chief Operating Officer also plans and implements service adjustments and is responsible for the operating and capital budget for the Operations Directorate.

Budget information and specific responsibilities and functions of each area under the COO are included in the individual departments' section of this book.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Daily operation of MBTA services including Subway, Bus, Commuter Rail, Commuter Boat, Private Carriers, and THE RIDE	Direct operating personnel in planning and delivering services in a cost-effective manner with a focus on customer service and attention to all applicable policies and regulations	Reliability-MMBF by mode	$ 489,626
Operating Budget Management	Oversee the budget development process and control total spending within the operating divisions	Actual expenditures compared with the budget	$ 157,025
MBTA Fleet Management	Develop fleet plans for Bus, Subway, Commuter Rail, and THE RIDE Ensure that bus and rail car maintenance practices are cost effective and adhere to quality control guidelines Oversee the specification, design, and procurement of new vehicles	Publish fleet plans for all modes of service Proceed with the procurement process for new Blue Line cars	$ 1,090,115
Strategic and Capital Planning for Operations	Establish Operations' priorities for capital investment Develop long-range operating plans	Obtain capital funding for Operations' priorities	$ 157,025
Coordination with the MBTA's Construction Department	Ensure that MBTA construction activities are staged and carried out with as little inconvenience to passengers as possible	Attend regular coordination meetings with Construction personnel Identify conflicts and develop solutions	$ 44,061
Human Resource Management within Operations	Ensure that all personnel actions within Operations comply with the MBTA's goals for diversity, cost effectiveness, and management development	Select and recommend candidates for vacancies	$ 64,800
Transportation Planning and Oversight for Special Events	Develop and implement operating plans for special events such as First Night, July 4th, St. Patrick's Day, major sports events, and concerts	Operate transportation services for special events without preventable incident	$ 42,985
TOTAL BUDGET			**$ 2,045,637**

Bus Operations

Bus Operations transports approximately 110 million passengers a year—nearly half of all MBTA riders—on 175 bus routes. Throughout FY 2007, the Authority continued the procurement of new vehicles, adding New Flyer Emission Controlled Diesel (ECD) buses to the existing fleet. The introduction of 155 vehicles into revenue service during FY 2007 and FY 2008, combined with the recent retirement of the 1984-1987 Series buses over the past two years, will lead to a decrease in the average bus vehicle age from 14 years to under 5 years.

Bus Operations continues the Nova Series PowerPack Program, which will allow 125 Nova buses to remain in service until FY 2010. The continued reinvestment in the bus fleet will strengthen the MBTA's commitment to providing new, clean, fuel-efficient, state-of-the-art buses to our customers and neighbors.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Bus Service	Provide scheduled service of over 7,300 weekday trips over 175 routes with 1,030 revenue service vehicles	370,000 passengers carried on local and express bus service daily Provide nearly 28,000,000 scheduled miles of service Maintain number of dropped trips at less than one percent Provide unscheduled service to support special events and service diversions (approximately 5,000 trips annually)	$99,174,210
Bus Vehicle and Station Cleaning	Interior and exterior cleaning – buses and trackless trolleys	Ensure exteriors of all buses and trackless trolleys are clean every day	$3,108,800
	Cleaning of all Silver Line surface stations and Transitway stations	All Silver Line related stations: Dudley Station, 16 surface stations, and 3 Transitway stations	
Bus Vehicle and Equipment Maintenance	Daily vehicle servicing – buses and trackless trolleys	Daily inspections of all buses and trackless trolleys to ensure fuels, fluids, and vital equipment meet MBTA safety and operational standards	$83,388,879
	Preventive maintenance – buses and trackless trolleys	Major component inspections to ensure fleet safety and reliability Special service campaigns to replace and upgrade vital components Achieve 7,000 miles between failures (MMBF) for total service	
	Preventive maintenance – non-revenue vehicles	Major component inspections to ensure fleet safety and reliability	
	Corrective maintenance – buses and trackless trolleys	Extensive brake repair and replacement program Monthly vehicle frame and body repair program Ongoing engine, transmission, and radiator repair program Power trains, suspension, and steering repair programs Electrical component repair and replacement program Extensive heat ventilation/air conditioning repair and replacement program Ongoing wheelchair lift repair and improvement program	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Bus Vehicle and Equipment Maintenance (cont.)	Corrective maintenance–non-revenue vehicles	Light, medium, and heavy duty vehicle maintenance and repair program	
	Vehicle painting–buses and trackless trolleys	Ongoing paint program for all eligible vehicles at Everett facility	
	Engineering and technical support	Develop new specifications and modifications that will improve service, comfort, reliability, and efficiency	
	Materials manufacturing	Develop and produce signs and decals for MBTA vehicles and facilities Perform upholstery and fiberglass repairs and upgrades to MBTA vehicles	
	Spare parts and equipment procurement	Ensure that maintenance, repair, and overhaul efforts have necessary parts and equipment on hand	
	Facilities maintenance	Maintain that all bus facilities meet MBTA cleanliness and safety standards	
TOTAL BUDGET			**$185,671,890**

Operations and Service Development

The Operations and Service Development Department provides the Authority's Operations Directorate with analytical support to monitor, plan, and schedule transit services for all directly operated modes and all contracted services except Commuter Rail. This Department consists of several groups: Plans and Schedules, Private Carrier Services, the Office for Transportation Access, and the Operations Technology Group. In addition, this Department also oversees the administration of the Ridership Oversight Committee, and various special projects. Collectively, these offices provide resources to the operating departments to enhance the efficiency and effectiveness of all transit services offered by the MBTA, ensuring maximum coordination among Bus, Subway, Commuter Boat, THE RIDE, and Private Carrier Services.

Plans and Schedules

The Plans and Schedules division includes the Service Planning and Schedules Departments. These offices are responsible for preparing transit schedules for the Bus and Subway Divisions, monitoring ridership trends and service quality, evaluating the effectiveness of existing services, and identifying opportunities for service enhancements.

In FY 2009, this unit will continue to focus on additional improvements to the schedules and, by using the information gathered with the new technologies such as CAD/AVL and automatic passenger counters, to create more realistic running times and improved reliability of the service. Simultaneously, they will work to tighten the schedules resulting in more reliable service at a less than proportionate increase in manpower. New ridership estimates will also be developed using data from the new fareboxes and automated passenger counters.

FY 2009 will also be the time to implement the new Service Plan based on public input that was received. This biennial process provides the public with an opportunity for sharing new ideas for services that are considered in the context of the total cost of new service compared to existing services. This approach helps the public understand the tradeoffs involved in adding service in a financially constrained environment where all services are subsidized.

With completion of construction activity on the Orange Line, an analysis of the running time data will allow construction of a new, tighter Orange Line schedule. Completion of construction/certification activity on the Green Line will facilitate the building of schedules without concern as to vehicle type by line. Finally, the Blue Line is also anticipating the delivery of new cars partial six-car operation to begin in Fall 2008.

Service Planning is also responsible for monitoring the collection of data and preparation of the various MBTA service performance reports to the Federal Transit Administration (FTA). The group will also continue to assist the long-term planning group and Executive Office of Transportation (EOT) in their analyses of projects, such as the extension of the Green Line to Medford and the Urban Ring.
Providing customer information remains a top priority for this group with their continued focus on the

production and availability of schedules throughout the system. They also provide informational flyers and updates to the Web.

Operations Technology

The Operations Technology group is responsible for the design, implementation, management, and ongoing support of technology projects. Projects overseen by the group fall into four general categories: workforce management, maintenance management, Intelligent Transportation Systems (ITS), and performance management.

The group's workforce management projects are focused on adding efficiency, accountability, and standardization to business processes in Operations, with special emphasis on work selection, daily assignment, and timekeeping. In FY 2009, the group will oversee the design and initial implementation phases of the Daily Operations Resource Management project, which will automate many manual processes in transportation districts and replace obsolete legacy systems used for work selection and seniority management. The group will also continue its management of the biometric Timeclock program and oversee expansions of and enhancements to the system. Timeclock enhancements in 2009 will include the ability to clock individual tasks and a more complete integration with the Payroll system. Other workforce management systems and projects supported by the Operations Technology group include the Attendance Policy Monitoring Tools and the Substitute Coverage List Program Administration Tools.

Maintenance departments in Operations are responsible for ensuring safe and reliable operation of transportation services and equipment. The Operations Technology group supports these efforts by providing project management and systems analysis services to several maintenance management projects. In FY 2009, the group will coordinate a top-to-bottom review of the Maximus implementation in Operations to assess its benefits and identify opportunities for improvement, focusing on addressing the needs of the end-user maintenance departments. This will result in the reintroduction of the current Maximus applications along with the introduction of a new Facility Maintenance application, the design and implementation of which will be managed by the Operations Technology group. In addition, the group serves as liaison from Operations for the Customer Communication Management System (CCMS) project.

The Operations Technology group is responsible for several Intelligent Transportation Systems (ITS) projects. Intelligent Transportation Systems use technology to directly support transportation operations, service analysis, and customer experience. During FY 2009, the group will coordinate design of a multi-modal Real-Time Customer Information System. Contracts for the Silver Line ITS system and automated stop announcement systems on board MBTA buses are managed directly by the department, and the group provides project management resources for other initiatives including the Computer Aided Dispatching/Automatic Vehicle Location (CAD/AVL) project and the pilot Automated Passenger Counter (APC) project. The group administers the maintenance contract for the ITS equipment installed on all MBTA buses. During FY 2009, the group will begin design work on a Ridership Analysis Project designed to expand use of APCs and integrate ridership data from several systems to support reporting and analysis needs.

The group also provides technical support and project management to several performance management initiatives underway in Operations. In FY 2009, the group will continue its role coordinating collection and integration of data for use in biweekly, monthly, and quarterly Operations performance reports, and will begin design of an automated performance management/business intelligence project.

Special Projects

This group also provides management and support to the MBTA Rider Oversight Committee (ROC). The ROC is a diverse group of riders, advocates, and MBTA employees that provides recommendations to the MBTA relative to the needs and concerns of all riders. The Rider Oversight Committee was born out of the fare policy commitments. Its mission is to address the concerns of public transit customers and develop strategies aimed at increasing ridership.

Other special projects include coordination of the shelter program with CEMUSA, bike racks and cages, fleet plans and the introduction of new signage at multiple locations throughout the system.

Private Carrier Services

The Private Carrier Services Division of the Operations and Services Development Department provides oversight and administration of the Authority's subsidized transportation services, which consist of water transportation and two bus transportation service programs. The Division also provides oversight and administrative support for the Commuter Bus Program on behalf of the Executive Office of Transportation (EOT).

Water transportation services consist of two outer harbor routes serving the South Shore communities of Hingham, Hull, and Quincy. These routes terminate at the Boston waterfront areas of the Long Wharf North adjacent to Christopher Columbus Park, Rowes Wharf, and Logan Airport. The MBTA owns the assets of the MBTA Harbor Express operation, which include a ticket office, docking facility, and parking lot located at the former Quincy Shipyard, as well as two high-speed catamarans. In FY 2009, the MBTA will construct additional parking at this location.

Water transportation service is also provided on one inner harbor route serving the Charlestown Navy Yard and Long Wharf adjacent to the New England Aquarium. With the continued development of the Seaport District, the MBTA will work with the Executive Office of Transportation (EOT), the Boston Redevelopment Authority, Massport, and the Department of Environmental Protection to draft future policies regarding the advancement of water transportation in the Commonwealth.

Under the Private Carrier Bus Services Program the MBTA contracts with private bus operators to provide bus services within the MBTA district. In this program, the MBTA determines the service schedule, days of operation, fares, and type of vehicle to be used in the service. The MBTA works closely with the operators to ensure that contract standards are met and efforts are made to improve ridership and cost-effectiveness. These routes are identified with MBTA designated route numbers: 710 is North Medford to Meadow Glen Mall via Medford Square; 712/713 is Point Shirley, Revere to Orient Heights Station; 714 is Pemberton Point, Hull to Hingham Depot; and 716 is Cobbs Corner, Canton to Mattapan Station via

Milton. Last year, the MBTA adjusted route 714 to make limited stops at the Nantasket Junction Commuter Rail Station. A route variation was also added to the 716 to serve Royall Street. In FY 2009, peak period service to Wellington Station will be introduced on the 710. These changes are intended to improve connectivity to MBTA services and increase ridership.

The Suburban Bus Program enables the MBTA to respond to the need for transit service in underserved communities in the MBTA district. Under this program, communities are offered a pre-set amount of financial support to enable them to provide their own public transit service, but they must provide a minimum of 35% of the cost of operation. The communities have control over the service routes, schedules, and fares. This gives them an opportunity to utilize local knowledge to design systems that meet their needs. Currently, the MBTA works with the seven (7) communities to assist them in maximizing ridership, operating safely, and monitoring cost-effectiveness. In addition, the MBTA encourages routes and schedules that connect to MBTA and other public transit services.

The Commuter Bus Program (formerly known as the Inter-District Transportation Program) provides financial assistance, made possible through the EOT, to private bus operators for service in areas not served by the MBTA but deemed to be important to public transit in the region. Although the routes, service schedule, fares, and transit vehicles used are set by the carriers, the EOT and Public Works must approve the service in order to provide financial assistance. The MBTA works, on EOT's behalf, with the operators to improve ridership and service quality, and regularly evaluates the services to ensure that contract standards are met.

Paratransit Services – **THE RIDE**

OTA manages the Authority's ADA compliant Paratransit Program, THE RIDE, for persons who are unable to use fixed route services some or all of the time due to a physical, mental, or cognitive disability. The service is operated by four private firms under contract to the MBTA covering 62 cities and towns (including Framingham & Natick service covered by the MWRTA agreement), spanning 729 square miles and operating 7 days a week, generally from 6 A.M. to 1 A.M. including holidays. Each contractor serves one of the following service areas, designed to optimize regional travel patterns: North, Northwest, South, and Southwest. Each contractor also shares responsibility for serving the City of Boston, providing a choice of contractors for those customers who are Boston residents.

All current contracts with THE RIDE vendors expire in June 2009. Beginning in late FY 2008 and throughout FY 2009, OTA will undertake a procurement process to award new contracts for the period FY 2010-FY 2014. During this time, OTA will also upgrade the MBTA's Paratransit Business Software/ Hardware Systems, which provide the platform for managing the entire RIDE Program.

Started in April 1977, THE RIDE consistently ranks as one of the premier operations in the country in providing customers with safe, reliable, and efficient service. Sedans and lift-equipped vans are used to transport RIDE customers. Beginning in FY 2005, the Authority replaced over 75% of the fleet, installed on-board mobile data computers with GPS vehicle locators in THE RIDE fleet of over 550 vehicles, and introduced a new state-of-the-art Paratransit Computer System. These enhancements have permitted the Program to support a 30% increase in ridership, a 13% decrease in complaints, while maintaining a 0% trip denial rate for trips requested over this same period.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
OPERATIONS AND SERVICE DEVELOPMENT			
Schedule Preparation	Prepare work assignments	Construct work for 4,000 operating personnel quarterly	$1,302,691
	Coordinate the design, printing, and distribution of schedules	Design 175 customer schedules quarterly and distribute 3 million copies to riders; prepare files for quarterly updates to MBTA website	
	Disseminate service and manpower information to management	Produce service statistics and information quarterly	
Service Planning and Special Projects	Market research	Conduct passenger surveys and counts Analyze service and make recommendations on ways to implement improvements	$1,138,596
	Service evaluation	Implement 2008 Service Plan and refinements to Service Delivery Policy; provide minor improvements to schedules quarterly	
	Utilize data from Smart Bus technology	Develop improved running time information for schedules	
	Service statistics	Maintain ridership and service statistics; distribute reports on service statistics; prepare PowerPoint presentations on various service features; submit data to FTA	
	Bus stop inventory	Maintain data on stops and shelters, including locations and ridership, and respond to requests for information	
	Community and customer requests	Respond to an estimated 500 passenger inquiries and issues annually; monitor service for compliance with Title VI; develop improved signage	
	Planning	Assist in long-range planning efforts including the Green Line extension; assist the Construction Department with various shuttling and planning initiatives; continue work with community groups on the development and implementation of new or modified services	
Operations Technology	Design, implement, and manage technology projects in the areas of workforce management, maintenance management, Intelligent Transportation Systems (ITS), and performance management	Manage more than 10 complex technical projects, ensuring that requirements are met, overseeing the efforts of vendors and consultants, and coordinating with departments throughout the Authority	$1,437,935
	Support, maintain, and enhance existing technology systems and equipment in Operations	Ensure reliable operation of systems and related equipment installed at numerous locations and on-board every MBTA bus, responsiveness to user requests, and implementation of enhancements to keep systems in line with business needs	
TOTAL BUDGET			**$3,879,222**

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
PRIVATE CARRIER SERVICES			
Water Transportation	Hingham, Quincy and Hull Commuter Boat services	Average 3,403 daily passengers	$4,206,626
	Inner Harbor Ferry Services serving Charlestown Navy Yard and Long Wharf	Average 808 passengers daily	
	Process financial assistance in accordance with contract terms; ensure appropriate financial record keeping and statistical reporting	Monitor the major performance measures: average daily ridership, on-time percentage, mean miles between failures, cost per passenger, and fare recovery ratio	
	Commuter Boat contract management, administrative support and asset management services	Maintenance of commuter boat facility and ticket office in Hingham Utilities for Hingham operation Lease expenses for the Quincy and Hingham Commuter Boat service Printing of tickets and schedules Provide security and advertising Maintenance of docks and piers Engineering services Equipment rental	
Private Carrier Bus Program	Contract for bus services in areas not covered by MBTA routes: Winthrop, Hull, North Medford, Canton		$1,693,183
	Process financial assistance in accordance with contract terms; ensure appropriate financial record keeping and statistical reporting	Monitor the major performance measures: average daily ridership, cost per passenger, farebox recovery ratio, and cost per passenger mile	
	Evaluate service routes for efficiency and cost-effectiveness	Work with carriers to maintain and improve service standards and ridership	
Suburban Transportation Program	Provide financial support and management assistance to seven (7) communities in their delivery of local bus service that supplements MBTA services	Work with carriers to maintain and improve service standards and ridership	$540,000
	Process financial assistance in accordance with contract terms; ensure appropriate financial record keeping and statistical reporting	Monitor the major performance measures: average daily ridership, cost per passenger, farebox recovery ratio, and cost per passenger mile	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
PRIVATE CARRIER SERVICES (CONT.)			
Commuter Bus Program	Provide contract management and administration, on behalf of the Executive Office of Transportation, to selected companies providing bus services that supplement and connect with MBTA services	Work with carriers to maintain and improve service standards and ridership	$0
	Process financial assistance in accordance with contract terms; ensure appropriate financial record keeping and statistical reporting	Monitor the major performance measures: average daily ridership, cost per passenger, farebox recovery ratio, and cost per passenger mile	
	Evaluate all commuter services from outlying communities in conjunction with the Service Plan		
TOTAL BUDGET			**$6,439,809**

PROGRAM	ACTIVITY	MEASURE	FY08 BUDGET
OFFICE FOR TRANSPORTATION ACCESS - THE RIDE - PARATRANSIT PROGRAM			
THE RIDE- Paratransit Program	Paratransit Contract Operations - THE RIDE (excludes Framingham and Natick - MWRTA Agreement)		
	Paratransit Contract Management	Serve over 1.8 million passengers Coordinate factory inspection, delivery acceptance, and deployment of 42 new lift-equipped vans Manage RIDE Service RFP No. 43-08 for FY 2010-2014 Paratransit Service Contracts Manage Mobilization activities associated with 3 Contracts awarded via RFP No. 43-08 Contract oversight and quality control/complaint resolution Reconcile and process for payment Monthly Invoices totaling approximately $4.8M for the delivery of RIDE services Provide internal financial/statistical reporting	$55,591,919

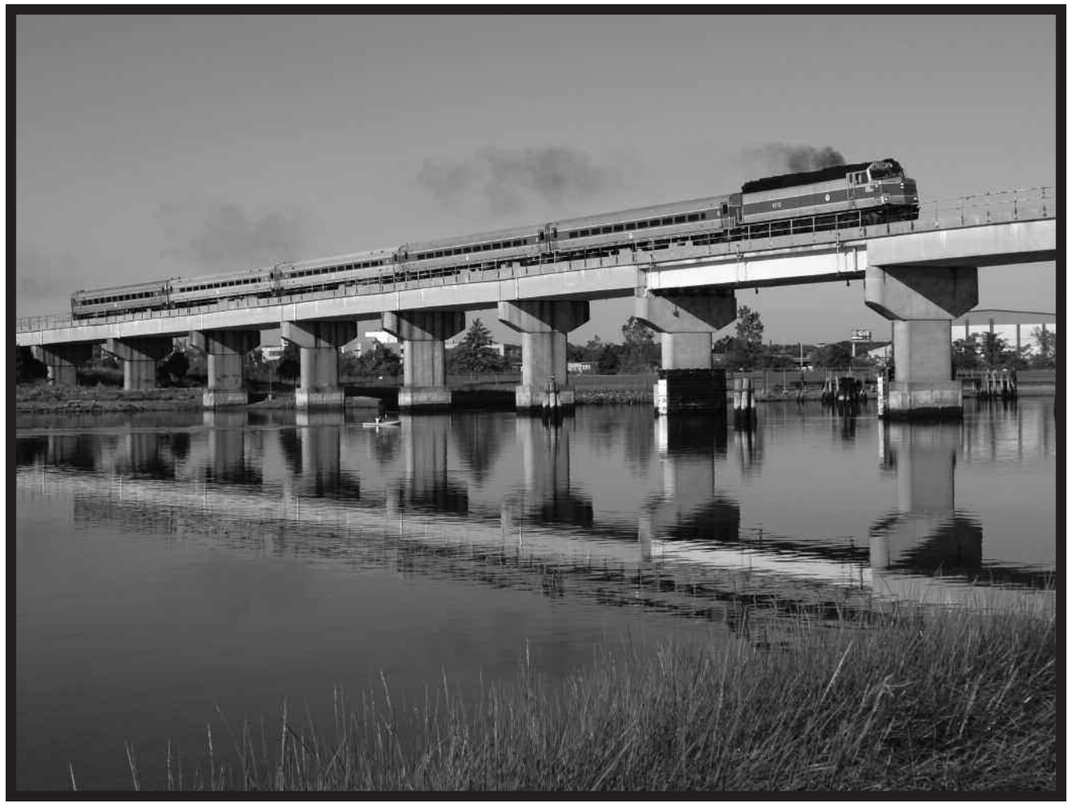
PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
OFFICE FOR TRANSPORTATION ACCESS - FIXED ROUTE SERVICES			
	Paratransit Customer Eligibility	Conduct Paratransit eligibility review and process 18,000 applications Process 82,800 account deposits for Paratransit customers	
	Paratransit Customer Service	Serve as liaison for the Authority with the senior and disability communities Participate in 12 AACT meetings to address concerns and present information on paratransit accessible services Participate in 12 public meetings to address concerns and present information on Paratransit services to area agencies, councils, and advocacy groups	
	Paratransit Wages Combined		$841,020
	Paratransit Materials		$16,720
	Paratransit Services		$515,900
TOTAL BUDGET			**$56,965,599**

Operations Support

The Operations Support Directorate is divided into two divisions: the Building Division and the Power Division. The Building Division maintains, inspects, and repairs over 290 MBTA buildings, facilities, and stations located throughout the system. It is also required to maintain and inspect 142 transit and highway bridges. The Power Division provides electricity to the system through a network of 46 traction power substations, 3 switching stations, and 2 combustion jet turbine engines in South Boston. These combustion jet engines are capable of operating a majority of our rapid transit system in case of an emergency.

Operations Support is also responsible for monitoring the Authority's contract with Florida Power and Energy Marketing Inc., the primary supplier of our electricity for traction and non-traction use. This contract started in February 2008.

Operations Support also monitors usage of natural gas, water, sewer, steam, and heating oil that is used throughout the Authority.



PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Building & Structure Maintenance	Escalator/elevator maintenance Facilities maintenance and security Passenger station maintenance and security Right-of-way fencing and bridge inspection Subway tunnel inspection and maintenance Emergency vent fan maintenance Emergency generator maintenance Environmental compliance Utilities management	Inspect and maintain all stations; respond to and close all priority maintenance calls within 72 hours; maintain escalator and elevator availability at 97% and above	$74,040,093
Power Systems	Inspect and maintain 46 traction power substations, 3 switching stations, and 2 combustion jet turbine engines Maintain 54 unit substations Manage power supply and power resources Maintain 98 miles of trolley wire, 3,000 poles, and 1,000 power switches Maintain 800 miles of AC and DC cables	Maintain jet running at 100% availability and power supply at 100% availability	$11,665,950
Director's Office	Budget and administrative duties Plan and direct the Directorate's activities including human resource management	Oversee all budgetary functions; maintain personnel records; oversee department's materials and services requisition process	$277,935
TOTAL BUDGET			**$85,983,978**

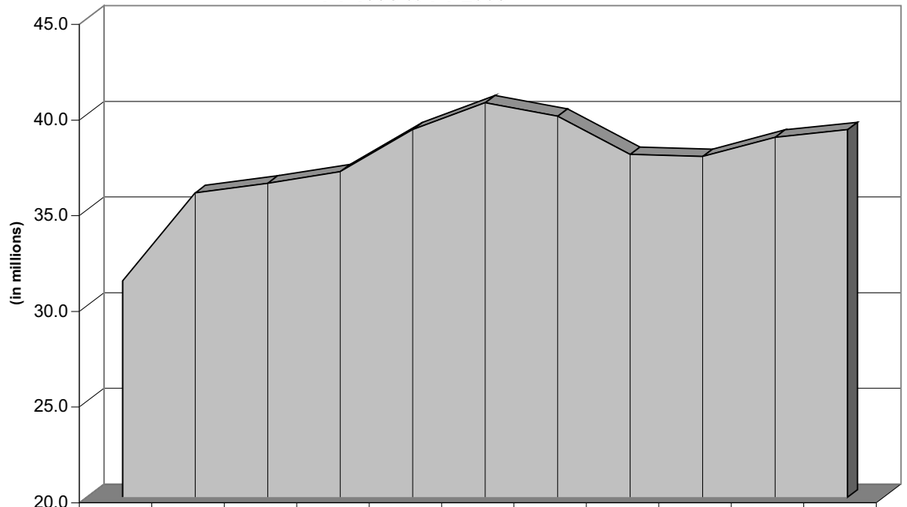
Railroad Operations

Railroad Operations oversees operations and scheduling of Commuter Rail service on 13 lines, serving an average of 144,000 customers each weekday. Unique among MBTA operating departments, Railroad Operations currently contracts with the Massachusetts Bay Commuter Railroad Company (a Boston-based consortium consisting of Alternate Concepts Inc., Veolia Transportation, formerly Connex North America, and Bombardier) to operate Commuter Rail service and maintain MBTA-owned rolling stock and rights-of-way.

The MBTA owns 80 revenue service locomotives and 410 passenger coaches, 140 of which are double-decker cars. The MBTA currently has approximately 670 miles of Commuter Rail track and 133 Commuter Rail stations.

Commuter Rail service currently consists of 494 weekday trips, 188 Saturday trips, and 160 Sunday trips. Extra trains are provided for New England Patriots football games and other special events. The Department also monitors the maintenance and repair of rolling stock, railroad right-of-way, track and structures, bridges and related structures, and communication and signal systems. Oversight responsibilities also include input into rolling stock procurement, facility planning, and integration of rail extensions into the existing system.

Commuter Rail Annual Ridership
FY 1998 to FY 2008



	FY1998	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008 *
Ridership (in millions)	31.3	35.9	36.4	37.0	39.2	40.6	39.9	37.9	37.8	38.8	39.2

*excludes Greenbush

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Fixed Price Contract (including Fixed Price - Greenbush)	Provide Commuter Rail Service according to the terms of the February 19, 2003 Operating Agreement between the MBTA and the Massachusetts Bay Commuter Railroad Company as outlined below	Provide transportation, maintenance of equipment, maintenance of way, dispatching, environmental, information management, administrative, financial, and customer services related to, and necessary for, the performance of commuter rail services	$219,610,625
Commuter Rail Service	Provide scheduled service of 2,818 trips per week over 13 routes with 80 revenue service locomotives and 410 coaches	Carry an average of 144,000 passengers each weekday Collect a total of $138,625,103 in fare revenue (cash and pass), of which $6,601,082 is associated with Greenbush service Provide 4,149,877 train miles of service Achieve 10,200 mean miles between failures for the months of March-November and 9,200 mean miles between failures for the months of December-February Complete 95% of trips within 5 minutes of schedule	
Vehicle Cleaning	Exterior and interior cleaning - locomotives and coaches	Clean 620 locomotive exteriors monthly Complete 3,894 coach cleanings (interior and exterior) monthly Perform 2,023 inspections and service tasks monthly	
Equipment Maintenance	Preventive maintenance - locomotives	Complete 640: 45, 92, and 180 day, and 1 and 2 year locomotive inspections	
	Preventive maintenance - coaches	Complete 924: 45, 92, and 180 day, and 1, 2, and 4 year coach inspections Complete 410 HVAC inspections	
	Corrective maintenance - locomotives	120 air repairs/replacements annually 160 train control repairs/replacements annually 120 electrical system repairs/replacements annually 20 carbody repairs annually 20 truck repairs/replacements annually	
	Corrective maintenance - coaches	130 air repairs/replacements annually 210 HVAC repairs/replacements annually 109 electrical system repairs/replacements annually 10 carbody repairs/replacements annually 57 truck repairs/replacements annually	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Right-of-Way Maintenance	Track and grade crossing maintenance	77 miles of track repairs/replacements annually 41,000 railroad ties replaced annually 15 crossing gate mechanism repairs/replacements annually 15 grade crossings repaired/resurfaced annually 5-7.5 miles of continuous welded rail installed annually	
	Switch and signal maintenance	382 switch repairs/replacements annually 564 track circuit repairs/replacements annually 688 crossing warning system repairs/replacements annually 545 signal repairs/replacements annually	
	Bridge and culvert maintenance	542 bridge inspections, paintings, and/or repairs annually 730 culvert inspections annually 6 culvert replacements annually Reshape 2,500 linear feet of ditches annually	
	Drawbridge maintenance and operations	102 drawbridge inspections and repairs annually	
	Snow removal	Snow removal from station platforms, parking lots, and critical track areas	
	Non-revenue vehicle maintenance	550 non-revenue vehicle inspections/repairs annually	
	Other engineering services	Scan and create an electronic index of at least 10,000 drawings per agreement year	
Miscellaneous Line Items	Additional Services and Projects	Route 128 Station maintenance; use of Amtrak trackage at Pawtucket Layover; CETC replacement design; Attleboro Line recapitalization projects; Amtrak flagging services to support MHD maintenance and bridge inspections (Attleboro Line Agreement); Kawasaki coach maintenance for RI service; service enhancements; maintenance of unused right-of-way	$5,570,959
	Amtrak FELA/Third Party Claims	Payments for pre-July 1, 2003 claims relating to injuries on railroad property	$2,000,000
	MBCR Third Party Claims	Payments for post-July 1, 2003 third party claims relating to injuries and damages on railroad property	$200,000
	Train Fuel	Bulk deliveries at Commuter Rail Maintenance Facility and Southside S&I Facility	$35,892,168
	CSX Transportation	MBTA passenger trains travel over CSX trackage annually; Worcester Station leases; maintenance of signals and interlockings - Worcester extension; additional dispatching - Worcester service; additional signal maintainer; fee for MBTA special train operations	$2,353,546

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
	Amtrak Trackage Fee	Payment to Amtrak for third-party trackage fees collected from CSX for its operation on the Attleboro Line	$150,789
	Other Expenses	Amortization for mobilization; commuter rail service contract, 13c litigation expense, and other commuter rail matters	$2,397,976
	MBCR Penalties	Penalties assessed to MBCR per the terms of the Operating Agreement	($2,000,000)
TOTAL SUBSIDY			**$266,176,063**
MBTA Oversight	Station maintenance oversight	286 station cleanings weekly Landscape 5 stations monthly 85 miles of fencing inspections monthly 20 fence, station, and sign repairs/replacements monthly	$141,628
	Transportation oversight	Ensure contractor accountability, resolve contract violations, and address/resolve operational issues and customer complaints	$233,226
	Maintenance of equipment oversight	Ensure contractor accountability, resolve contract violations, and address/resolve operational issues and customer complaints	$449,985
	Maintenance of way oversight	Ensure contractor accountability, resolve contract violations, and address/resolve operational issues and customer complaints	$514,654
	Commuter Rail Maintenance Facility oversight	Coordinate facility operations, ensure contractor accountability, and address/resolve operational issues	$0
	Finance and contract administration	Ensure contractor accountability, resolve contract violations, and address/resolve contract and financial issues Prepare and monitor departmental budget, perform accounting functions and other financial analyses, and conduct regular audits of contractor	$609,106
	Customer service and information	Respond to passenger requests for service information and address customer complaints	$117,251
Miscellaneous Line Items	Materials		$114,500
	Services		$311,071
TOTAL OVERSIGHT			**$2,491,421**
TOTAL BUDGET			**$268,667,484**

Subway Operations

Subway Operations provides safe, clean, and reliable transportation for over 690,200 riders each weekday on four subway lines—the Orange, Red, Blue, and Green Lines. Separate management teams under the guidance of the Director of Subway Operations oversee the daily transportation and maintenance activities for each line, while the Operations Control Center provides support for these services.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Red Line	Provide scheduled service of 427 one-way train trips per weekday	Maintain number of dropped trips at less than 1%	$30,888,556
	233,800 passengers carried on Red Line service daily	Exceed on-time performance of 95%	
	Maintain 218 revenue service vehicles	Maintain preventative maintenance schedule of 8,500 miles on the #1 and #2 Cars and every 15,000 miles on the #3 Car Exceed goal of 160 vehicles required for daily service	
	Average over 1,032,000 revenue service miles per month	Exceed goal of 39,000 Mean Miles Between Failure	
Orange Line	Provide scheduled service of 312 one-way train trips per weekday	Maintain number of dropped trips at less than 1%	$18,293,460
	176,600 passengers carried on Orange Line service daily	Exceed on-time performance of 95%	
	Maintain 120 revenue service vehicles	Maintain preventative maintenance schedule of 90 days or 12,500 miles Exceed goal of 102 vehicles required for daily service	
	Average over 512,000 revenue service miles per month	Exceed goal of 32,000 Mean Miles Between Failure	
Blue Line	Provide scheduled service of 378 one-way train trips per weekday	Maintain number of dropped trips at less than 1%	$11,034,252
	57,100 passengers carried on Blue Line service daily	Exceed on-time performance of 95%	
	Maintain 94 revenue service vehicles	Maintain preventative maintenance schedule of every 7,500 miles Exceed goal of 56 vehicles required for daily service	
	Average over 260,000 revenue service miles per month	Exceed goal of 26,000 Mean Miles Between Failure	
Green Line	Provide scheduled service of 1,162 one-way train trips per weekday	Maintain number of dropped trips at less than 1%	$46,481,194
	222,700 passengers carried on Green Line service daily	Exceed on-time performance of 95%	
	Maintain 209 revenue service vehicles	Maintain preventative maintenance schedule of every 60-90 days on all Green Line vehicles Exceed goal of 150 vehicles required for daily service	
	Average over 433,000 revenue service miles per month	Exceed goal of 5,500 Mean Miles Between Failure	
Vehicle and Station Cleaning	Revenue vehicle appearance	One interior and exterior wash per vehicle per month 120 vehicles waxed per month (Blue, Orange and Red) Daily interior cleanings of revenue fleet	$13,632,385
	Station appearance	Stations cleaned to MBTA specifications	
Vehicle Dispatching	Supervising vehicle movement	All trips supervised for schedule performance on all lines	$6,229,610
	Monitor quality of passenger station announcements	Make necessary adjustments to optimize service levels	
	Update FY 2009 Snow Plan	Complete distribution by November 30, 2008	
Training	Re-certify all Subway and Bus Operations employees on DTE rules, station & service management, emergency preparedness, and basic supervisory responsibilities	One day training completed annually	$3,693,357
	Outside agency training (Fire & Police) on Safety and Emergency Procedures	One day training as necessary	
	Right-of-Way Rulebook Training Program	Certify all new Subway and Bus Operations employees and MBTA contractors	
	Right-of-Way Re-Certification Training	Re-certify 2,000 employees and 2,000 contractors annually	
	Train all Subway and Bus Operations new hires	Certify new Subway and Bus Operations employees in all transportation classifications	
	AFC Equipment Training	One day training as necessary	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Main Repair Facility	Work Area Safety Inspection	Conduct monthly inspections	$15,575,974
	OSHA Voluntary Compliance Program	All 9 shop work areas develop and adhere to voluntary compliance program	
	Supply maintenance shops with necessary refurbished components in order to maintain fleet	Rebuild 257 brake packages for the Red Line Rebuild 60 gearboxes for the Red Line Rebuild 25 air compressors for the Red Line Rebuild 36 #3 Car AC traction motors for the Red Line Rebuild 60 GE 1264 A1 traction motors for the Blue Line Rebuild 50 brake packages for the Blue Line Rebuild 18 gearboxes for the Blue Line Rebuild 130 brake packages for the Orange Line Rebuild 25 Type 7 gearboxes for the Green Line Rebuild 80 #1460 B1 traction motors for the Red Line Rebuild 30 gearboxes for the Orange Line Rebuild 120 #1264 A1 traction motors for the Orange Line Rebuild 50 #7 Westinghouse traction motors for the Green Line	
	Receive A.A.R. Certification for the Air Section	Conduct monthly inspection	
	Enforce the use of safety glasses at all repair facilities	% of enforced compliance	
	Tool box safety training at all repair facilities	Continue to conduct monthly training classes	

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Administration & Finance	Develop department Capital/Operating fiscal budgets Monitor all fiscal transactions to ensure compliance with budget Prepare monthly line performance measures reports Coordinate all personnel movement activities Oversee all personnel substitute list posting and PER 1 form processing Coordinate all customer complaint correspondence		$3,269,282
TOTAL BUDGET			**$149,098,070**

Systemwide Maintenance and Improvements

Systemwide Maintenance and Improvements is responsible for the maintenance and repair of all track, signal, and communications systems. The collective focus of all SMI divisions is to support all transportation modes in order to achieve and retain "service grade condition," whereby revenue service operates efficiently and without restrictions.

The Maintenance of Way Division is responsible for the inspection and maintenance of 183 miles of rapid transit and surface line track. Additional functions include landscaping, facilities cleaning, rubbish pick-up, and snow removal at various locations throughout the system.

The Signals Division is responsible for the inspection and maintenance of all wayside and carborne signal systems, which provide route integrity, speed control, collision avoidance and enforcement, broken rail protection, and other safety controls. In addition, maintenance and support of the Operations Control Center is provided.

The Communications Division oversees the Authority's telephone, two-way radio, and public address/electronic sign systems, elevator intercoms, pagers, cellular telephones, remote fan control, fiber optic and copper cable plants. It is also responsible for maintaining life safety systems including fire alarms, security systems, closed-circuit televisions, and police call boxes.

The Administration Division provides supervision and oversight and performs all financial, budgetary, and clerical functions for the Department.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Right-of-Way Maintenance	Safety and training	Provide continuous track inspection training for Section Forepersons and System Repairers Provide training for procurement of CDL and equipment license	$15,454,430
	Scheduled preventive maintenance	Inspect entire Red, Orange, and Blue Lines twice per week Inspect entire Green Line three times per week Establish program maintenance procedures	
	Corrective maintenance	Replace 9,000 ties system-wide on rapid transit lines Surface and line station platform areas for ADA compliance Replace 1,000 ties on Orange Line	
	Right-of-Way cleaning	Clean 50 miles annually	
	Operations support	Provide support for transportation via snow removal efforts, emergency coverage, etc.	
Facilities Maintenance	Cleaning of buildings and other facilities system-wide	Ensure all facilities meet MBTA cleaning standards	$2,041,935
Signal Maintenance and Repair	Switch machine maintenance	Test and inspect 450 switch machines monthly	$12,260,153
	Third rail heater maintenance	Replace and repair defective third rail and switch heaters along with associated equipment systemwide	
	Vital relay testing	Rebuild and test 4,000 vital relays annually	
	Signal system testing and reporting	Test and report on methods of train operation, block signal systems, interlockings, traffic control systems, automatic train stop, cab signal, and other systems	
	Green Line signal system replacement	Complete system upgrades between Beaconsfield and Brookline Village and begin design for upgrades between Reservoir and Riverside	
Communications	Communications contracts	Monitor contracted preventive and corrective maintenance services for fire alarms, PA systems, radio communications, closed circuit television (CCTV), leases for antenna sites, etc.	$7,331,938
	Telecommunication "adds, moves, and changes"	Provide system-wide support for all modifications to the Authority's telephone and data communication services	
	Support automated fare collection	Support wide area network, hub station management, revenue collection, CCTV, station data communications projects, AFC, RST remote validators, and ITD	
	Construction Department support	Provide technical expertise on communication systems for over 40 construction projects	$1,025,338
Administration	Financial, budgetary, and administrative duties	Oversee all budgetary functions, provide clerical and administrative support	$798,266
TOTAL BUDGET			**$38,912,060**

Assistant General Manager for Design and Construction

Design and Construction

Design and Construction

With over $1 billion worth of active construction currently underway, the Design and Construction Department administers and manages all construction projects within the MBTA's Capital Investment Program (CIP). These projects include: the Green Line Station Access Improvements, the Blue Line Stations and Maintenance Facilities Modernization, upgrades to four Red Line stations in Dorchester, initiation of design for Fitchburg Line improvements, and advance of design for Elevator Program that includes upgrading existing cabs and the installation of new elevators to increase reliability/serviceability and upgrade safety features.

In addition, the Fairmount Commuter Rail Line is undergoing substantial improvements with the bridges undergoing rehabilitation, along with the signals, and interlocking upgrades and new station design. The Department has completed contracts for the new Charles/MGH Station on the Red Line and begun revenue operation of the Greenbush Commuter Rail Line; completed improvements to the Mattapan Hi-Speed Line and Fields Corner Station; and continued design and construction initiatives to support the fueling and maintenance of our Compressed Natural Gas (CNG) bus fleet. The Department is responsible for design, project management and scheduling, quality control, and coordination of environmental, operational, and community relations activities relating to the Capital Investment Program.

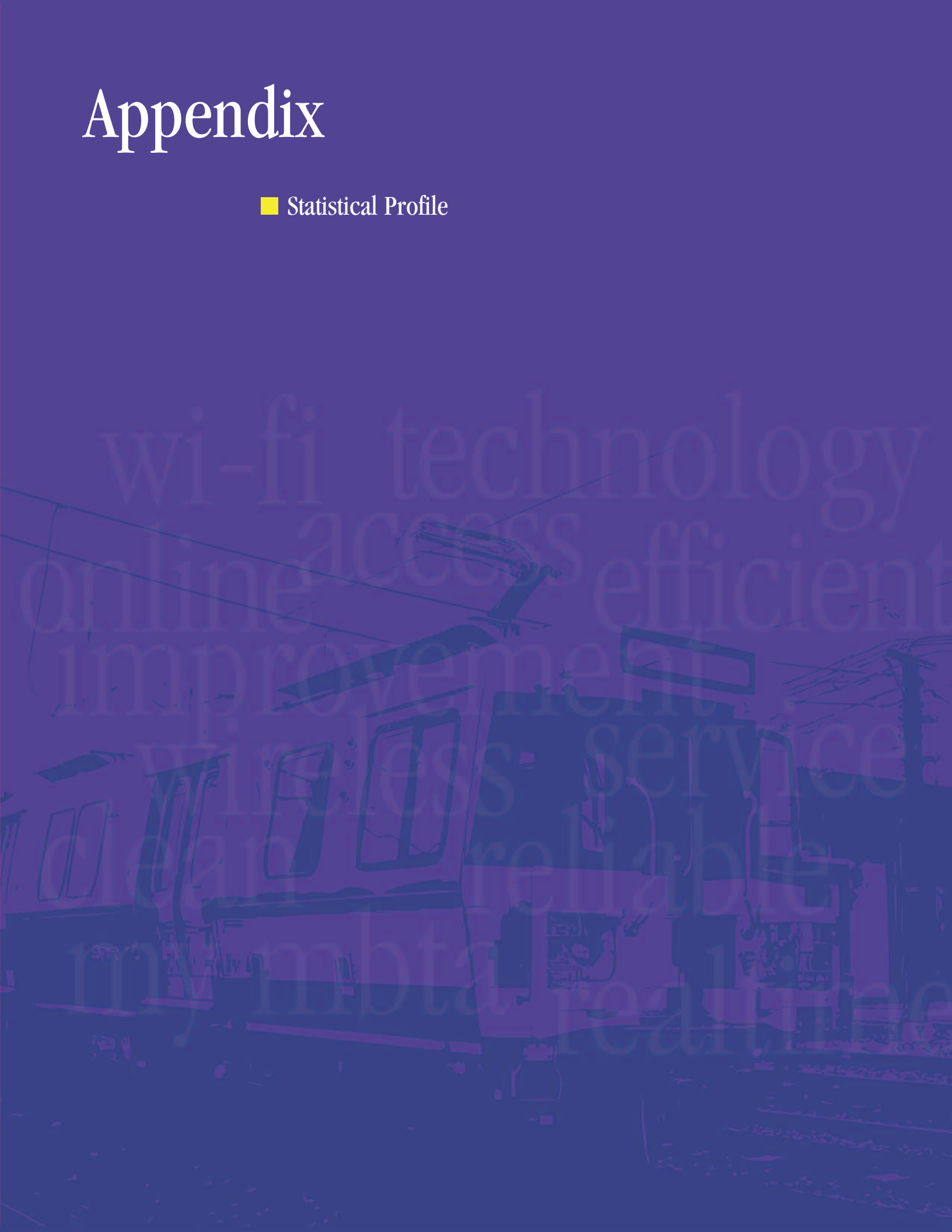
The Department's Design Division continues to provide in-house design support, resulting in significant savings on consultant contracts, improved quality, reduced design time, and a stronger link among the Design and Construction, Operations, and Development Departments.

PROGRAM	ACTIVITY	MEASURE	FY09 BUDGET
Program Management	Implement systems to improve management of projects	Successful implementation	$ 5,145,855
	Implement improved project control systems using newest information technology	Successful implementation	
	FTA Grant Management	Timely reporting and closeout	
	Implement a Quality Assurance Program, which includes audits, inspections, and a management information system	Successful implementation	
Project Management	Oversee the design, construction, and contractual agreements for specific projects	Ensure projects are completed on schedule and within budget	$ 9,151,593
TOTAL BUDGET			**$14,297,448**

Note: The above expenses are funded 100% from capital funds and do not affect the FY 2009 operating budget.

Appendix

- Statistical Profile



MBTA Service and Infrastructure Profile
August 2008

MBTA SERVICE DISTRICT

Cities and Towns	175
Size in Square Miles	3,244
Population (2000 Census)	4,663,565

TYPICAL WEEKDAY RIDERSHIP (FY 2008)

BY LINE (UNLINKED) FOR FY 2008

Red Line	241,962
Orange Line	181,349
Blue Line	58,189
Total Heavy Rail	**481,500**
Green Line Surface (includes Mattapan Line)	78,878
Green Line Subway (includes Riverside)	170,348
Mattapan - Ashmont Trolley (Re-opened Dec 2007)*	6,684
Total Green Line (Light Rail & Trolley)	**249,226**
Bus (includes Silver Line)	352,655
Silver Line Waterfront*	11,006
Silver Line Washington Street*	14,709
Trackless Trolley	13,912
Total Bus & Trackless Trolley	**366,567**
TOTAL MBTA - PROVIDED URBAN SERVICE	**1,097,293**

SYSTEM UNLINKED

MBTA - Provided Urban Service	1,097,293
Commuter Rail Boardings (Inbound + Outbound)	142,360
Contracted Bus	4,109
Water Transportation	4,490
THE RIDE Paratransit Trips Delivered	5,748
Total all Modes Unlinked	**1,254,000**

Notes: Unlinked trips can be defined as the number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

*Average weekday ridership taken from 2005 CTPS surveys for Mattapan Line and Silver Line Washington and 2007 for Silver Line Waterfront.

ANNUAL RIDERSHIP (FY 2008)

UNLINKED TRIPS BY MODE

Bus (includes Silver Line)	105,881,740
Trackless Trolley	3,855,103
Light Rail - Surface & Mattapan-Ashmont	25,693,314
Light Rail - Subway (includes Riverside)	55,488,289
Heavy Rail - Red Line	68,560,569
Heavy Rail - Orange Line	60,969,412
Heavy Rail - Blue Line	16,346,409
Total Rapid Transit & Bus/Trackless Trolley Operations	**336,794,837**
Commuter Rail Boardings	**39,207,425**
THE RIDE Paratransit Trips	**1,764,066**
Contracted Bus Carrier Boardings	1,116,502
Water Transportation Boardings	1,295,396
Total Contracted Services	**2,411,898**
TOTAL WITH THE RIDE PARATRANSIT	**380,178,226**
TOTAL SCHEDULED SERVICE (WITHOUT THE RIDE)	**378,414,160**

* Mattapan Trolley partial year. Re-opened December 2007.

ROUTE MILES (ONE-WAY, NON-DUPLICATIVE, AUGUST 2008)

Red Line (Ashmont & Braintree)	21
Orange Line	11
Blue Line	6
Green Line (B: 4, C: 3, D: 9, Outer E: 2, Inner E: 1, Subway: 4)	23
Mattapan-Ashmont Trolley	3
Total Subway	**64**
Silver Line Washington Street	**2**
Silver Line Waterfront Transitway Tunnel	1
Silver Line Waterfront Surface	7
Silver Line Waterfront Total	**8**

ROUTE MILES (ONE-WAY, NON-DUPLICATIVE, AUGUST 2008) CONT.

Bus	740
Trackless Trolley	11
Total Bus & Trackless Trolley	**751**
Commuter Rail	**394**
Inner Harbor Ferry	1
Commuter Boats*	37
Total Water Transportation	**38**
* Commuter Boat calculated as mileage one-way from Boston-Hingham, Quincy-Hull, Hull-Logan, Logan-Boston	
700-Series Private Carrier	79
Suburban Bus	161
Total Contracted Bus Routes*	**240**
* Excludes 724 miles of Contracted Bus routes under EOT auspices	
TOTAL ROUTE MILES	**1,497**

Notes: Route mile figures are rounded to the nearest whole number.

ROUTES (AUGUST 2008)

RAIL RAPID TRANSIT	
Red Ashmont (Dorchester), Braintree (South Shore)	2
Orange	1
Blue	1
Green Light Rail B, C, D, E	4
Mattapan-Ashmont Trolley	1
Total Rail Rapid Transit	**9**
BUS (VARIATIONS AND SUPPLEMENTALS NOT INCLUDED)	
Silver Line Washington Street Bus Rapid Transit	1
Silver Line Waterfront Bus Rapid Transit*	4
Local, Express, Community, Limited Service	175
Crosstown (Four route segments advertised as CT1, 2, & 3)	3
Trackless Trolley (North Cambridge Carhouse)	4
Other	4
Total MBTA Bus Routes	**191**
* Includes Route # 746 Tunnel Shuttle	

ROUTES (AUGUST 2008) CONT.

700-Series Private Carrier	4
Suburban Bus	7
Total Contracted Bus Routes	**11**
* Excludes 9 Contracted Bus routes under EOT auspices	
COMMUTER RAIL	
North Side	5
South Side	9
Total Commuter Rail	**14**
* Stoughton and Rockport considered distinct routes	
WATER TRANSPORTATION	
Inner Harbor Ferry	1
Commuter Boat	2
Total Water Transportation	**3**
TOTAL ALL ROUTES	**228**
* Includes Route #746 Tunnel Shuttle	

SCHEDULED WEEKDAY ONE-WAY TRIPS (FALL 2008)

RAIL-TRAIN TRIPS	
Red Line	426
Orange Line	312
Blue Line	368
Green Line (B,C,D,E branches)	1227
Mattapan-Ashmont Trolley	302
Total Subway	**2,635**
Commuter North Side	198
Commuter South Side	293
Total Commuter Rail	**491**

SCHEDULED WEEKDAY ONE-WAY TRIPS (FALL 2008) CONT.

MBTA BUS TRIPS	
Local, Express, etc.	13,535
Silver Line Washington Street	334
Silver Line Waterfront	641
Trackless Trolley	664
Total Bus & Trackless Trolley	**14,684**
WATER TRANSPORTATION	
Inner Harbor Ferry	78
Commuter Boat	84
Total Water Transportation	**162**
TOTAL ONE-WAY TRIPS	**17,972**

MBTA-PROVIDED PARK-N'-RIDE SPACES (AUGUST 2008)

Red Line	9,020
Orange Line	2,720
Blue Line	2,231
Green Line	2,019
Mattapan-Ashmont Trolley	141
Total Subway Operations	**16,131**
Bus	**200**
Commuter Rail, North Side	5,790
Commuter Rail, South Side	20,093
Total Commuter Rail	**25,883**
Commuter Boat	**2,191**
SYSTEM TOTAL	**44,405**

Selected Park-N'-Ride facilities NOT operated by the MBTA are listed in Chapter 8.

STATIONS AND STOPS (AUGUST 2008)

SUBWAY	
Red	22
Orange	19
Blue	12
Green Subway (includes Prudential, Symphony)	13
Total Subway by Route	**66**
Total Station Facilities*	**60**
* Shared facilities are Downtown Crossing, Park Street, North Station, Haymarket, State Street, Government Center	
SURFACE LIGHT RAIL AND TROLLEY	
Green Line B	18
Green Line C	13
Green Line D	13
Green Line E (Prudential, Symphony not included)	9
Total Green Line Surface	**53**
Mattapan - Ashmont Trolley, including Ashmont	**8**
Silver Line Washington Street	**13**
Silver Line Waterfront (not including surface branches)	**4**
COMMUTER RAIL	
North Side (including Mishawum & Riverworks)	57
South Side (including Foxboro)	77
Total Commuter Rail	**134**
TOTAL STATIONS	**278**
Bus and Trackless Trolley Stops **	**8,500**
Shelters: 675	
160 MBTA-owned; 280 Wall USA-owned; 165 Cemusa USA-owned; 70 other-owned	
**(Not included is the South Station Bus Terminal, owned by the MBTA and operated by others under contract)	
Water Transportation Docks	**8**
(Long Wharf counted twice [north side and south side], excludes seasonal dock at Georges Island)	

REVENUE VEHICLE FLEET (AUGUST 2008)

SUBWAY (HEAVY RAIL)	
Red #1, 01500 series	24
Red #1, 01600 series	50
Red #2, 01700 series	58
Red #3, 01800 series	86
Total Red (Heavy Rail)	**218**
Orange #12	120
Blue #4	70
TOTAL HEAVY RAIL	**432**
ACTIVE GREEN LINE LIGHT RAIL & TROLLEY	
Type 7 Total	112
Type 8 (accepted for service by MBTA)	95
Total Green Line	**207**
PCC Trolleys (Mattapan - Ashmont Line)	**10**
TOTAL HEAVY RAIL, LIGHT RAIL, TROLLEY	**649**
ACTIVE BUS & TRACKLESS TROLLEY	
RTS Diesel Bus	125
40' NABI CNG Bus	299
40' New Flyer CNG Bus	17
Articulated Bus (CNG)	27
Silver Line Washington Street Articulated Bus (CNG)	17
40' Neoplan ECD	193
Silver Line Waterfront DMA Diesel-Electric Bus	24
Silver Line Massport DMA Diesel-Electric Bus	8
Neoplan ETB	28
40' New Flyer D Bus	310
Flyer Trackless Trolley (active)	5
TOTAL BUS AND TRACKLESS TROLLEY	**1,053**

REVENUE VEHICLE FLEET (AUGUST 2008) CONT.

COMMUTER RAIL	
Coaches and Cab Cars	410
Passenger Train Locomotives	80
Total Commuter Rail	**490**
THE RIDE, Vans and Sedans (MBTA-owned only)	**419**
Total Heavy Rail, Light Rail, Trolley	**649**
ALL MBTA REVENUE VEHICLES	**2,611**

On Order: 94 Blue Line #5 cars from Siemens, 24 accepted for service as of 07/21/08

On Order: 75 bi-level commuter rail cars from Rotem USA

1134
1134
SHIRLEY

Massachusetts Bay Transportation Authority

Driven by Customer Service